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Process, Purpose and Profit: Organising the Creation of  
Shared Value in an Emerging Economy

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## ACKNOWLEDGEMENTS

### 16 years of Academia

To the places I've been and the journey I've stumbled, with inspiration from Dr. Seuss, I've remained humble.

In '07, a young dream took flight, my first taste of learning, my academic journey began, reaching new heights.

Through UCT's halls of knowledge, I began to roam, embracing this path that led me to my own.

In '10, expectations I chose to defy, by following my heart, and reaching for the sky. '12 brought my journey to honours, a step closer to the stars, resilience fuelled by passion, each moment left its scars.

In '13 paths diverged, a choice hard to make, I chose love and adventure, a new trail to stake.

Through '14, such twists, and turns, but I pushed through, finally reaching the summit, with knowledge as my guide.

In '18, ambitions anew unfolded, a Doctorate's journey, a story yet untold. Through trials and triumphs, each challenge embraced, determination, grit, time and again I faced.

'20 marked the turning, a candidate now I stood, supported by mentors, helped me more than they should.

And now, in '23, the thesis is done, my journey as scholar, a battle hard-won...

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Here's to the journey, sixteen years strong, to the places I've been, to where I belong.

My next journey is waiting, so I'll be on my way, I'm off to great places, today is my day.

## ETHICS CLEARANCE AND DECLARATION

### Ethics clearance

Ethics clearance was obtained from the University of Cape Town's Ethics Committee prior to commencing the research. Clearance was granted following the demonstration that study subjects would not be harmed, that their participation was voluntary, and that they would be protected with respect to anonymity and confidentiality. The secondary research data used was provided access by the Centre of Science, Technology, and Innovation Indicator's strict data access policy, approved by their internal Data Committee, and collected in accordance with the Human Sciences Research Council's Ethics Committee.

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## **ABSTRACT**

This thesis examines the organising principles of shared value creation as a process pertaining to how firms adopt, define and practice mutually beneficial value creation. As evidenced in the literature, formal firms typically begin a process of creating shared value as a strategic input. While insights from this research evidence how informal firms create shared value as an unintended outcome, and cross-sectoral partnerships evidence a continuous dialogical process of creating and recreating shared value. Since its conceptualisation in 2011 by Michael Porter and Mark Kramer, shared value creation has gained popularity in academic and practitioner communities alike. Research to date, has either primarily contributed to its conceptual definition and critique, or empirically aligning it within existing corporate sustainability frameworks. As a result, various tensions have emerged that tend to exacerbate dichotomies between economic and social value, and business and society. What remained to be contested are the ontological and epistemological underpinnings of creating shared value. To overcome these tensions and address this gap, I embark on a journey of critical scholarship that reveals how the conceptual intent of shared value creation is misaligned with its practice. I argue that the basis of this misalignment is ontologically and epistemologically derived, and is therefore, the source of the dichotomous tensions that have emerged in previous studies. I propose a new onto-epistemological visioning which reimagines creating shared value as an emergent, recurrent process. This reimagined stance is then applied empirically to two case studies to test this conceptual realignment in practice. This practical application contributes to the specific academic conversation of shared value creation, but more broadly contributes to process organisation studies and its affinity towards critical organisational scholarship. Upon reflection of these processual, critical ideals, emerges the key contribution of this thesis - that we as producers of knowledge are ethically implicated in having created this misalignment. As constructors of academic discourse, we are bestowed with ethical accountability for the narratives and boundaries our contributions solidify or dissolve. I conclude with a call to action for all organisational scholars to critically diffract on the consequences of our contributions, as we begin to reposition ourselves from knowledge producers to engaged knowledge creators.

# CONTENTS

1.1 Overview.....	10
1.2 Why Study Shared Value Creation in an Emerging Economy Context?.....	14
2.1 Introduction.....	17
2.2 The Concept of Shared Value Creation.....	19
2.2.1 Conceptual Criticisms.....	20
2.3 Systematic Review of the Literature on Shared Value Creation .....	23
2.3.1 Descriptive Summary of Relevant Publications.....	25
2.3.2 Conceptual Structure of the Literature.....	27
2.4 Conceptual Framework Developed.....	29
2.4.1 Overview of Conceptual Contributions .....	29
2.4.2 Discussion of Conceptually-Specific Contributions.....	30
2.4.2.1 Clarity and Context.....	30
2.4.2.2 Tensions between Economic and Social Value.....	32
2.4.2.3 Conceptual Implications.....	33
2.4.3 Overview of Empirical Contributions.....	35
2.4.4 Discussion of Empirically-Specific Contributions.....	37
2.4.4.1 Strategy and Practice.....	37
2.4.4.2 Redefining Value Chains.....	39
2.4.4.3 Enabling Local Cluster Development.....	40
2.4.5 Discussion of Empirically-Specific Implications.....	42
2.5 Overarching Themes .....	43
2.5.1 Situating Shared Value Creation within Sustainability Frameworks .....	43
2.5.2 Outcomes and Indicators of Shared Value Creation.....	45
2.5.3 Business Model Innovation .....	46
2.5.4 Values, Culture and Leadership.....	47

2.5.5 Co-creation and Stakeholder Engagement .....	48
2.5.6 Discussion of Overarching Themes .....	50
2.6 Discussion of the Literature .....	51
2.6.1 Shared Value Creation is Misaligned in Practice with its Conceptual Intentions .....	51
2.6.2 Authenticity and Trust .....	52
2.6.3 Summary of Discussion .....	53
2.7 Social Impact of an Unbound Organisation .....	54
2.7.1 Entwinement.....	55
2.7.2 Collective Becoming.....	55
2.8 Transitioning from Shared Value Creation to Creating Shared Value.....	56
2.9 Concluding Remarks and Way Forward.....	58
3.1 Introduction.....	60
3.2 The Open-World Ontology of Process .....	63
3.2.1 From Organisation to Organising.....	64
3.2.2 The Study of Organising Phenomena .....	66
3.3 Reflections on the Onto-Epistemological Limitations of Organising.....	68
3.3.1 Reflection in Sensemaking .....	68
3.3.1.1 Temporal Considerations and the Centrality of Discourse.....	69
3.3.1.2 Epistemological Shortcomings of Open-World Organising.....	69
3.3.1.3 The Limited Potentialities of Compromised Dualisms .....	71
3.4 Advancing Process with Pragmatism for the Study of Organising Phenomena.....	72
3.4.1 Reimagining Organisation Studies as Praxeology .....	72
3.4.2 An Introduction to Pragmatism.....	74
3.4.3 Prioritising Experience with Dewey’s Experimentalism .....	76
3.4.4 From Weick’s Interaction to Dewey’s Transaction.....	78
3.5 Complimenting Dewey’s Trans-Action with Barad’s Intra-Action.....	81
3.5.1 Introducing an Agential Dimension to a Trans-Actional Reality.....	81
3.5.2 Knowing and Meaning as Intra-Active.....	83
3.6 Towards an Ethico-Onto-Epistemology of Process-Praxeology .....	84
3.7 Methodological Implications of Process-Praxeology.....	86

3.7.1 Phenomenologically- Inspired Process-Praxeology .....	86
3.7.2 Diffractive Analysis.....	88
3.7.3 Bricolaged Methodology.....	89
3.8 Conclusion: A Process-Praxeologist’s Call to Action.....	89
4.1 Introduction.....	91
4.2 Background.....	92
4.3 Localisation as a Pathway for Creating Shared Value .....	94
4.4 Prioritising Process and Intra-Action .....	96
4.5 The Informal Sector as a Context for Shared Value Creation.....	97
4.6 Research Process.....	99
4.6.1 DigitalStorytelling: A Participatory, Co-Creative Methodological Entanglement .....	99
4.6.2 Background of the Participants .....	103
4.6.3 Analytical Framework.....	105
4.7 Findings .....	106
4.7.1 Agential Capacities and Interactions in the Action Net of Informal Entrepreneurs.....	107
4.7.2 Adaptive Sensemaking and Bricolage .....	111
4.7.2.1 Adaptive Sensemaking .....	111
4.7.2.2 Bricolage.....	114
4.7.3 Processes of Reflection in Emergent Narratives of Shared Value Creation.....	115
4.7.4 The Collective, Dynamic Action Net of Informal Businesses Creating Shared Value .....	119
4.8 Conclusion .....	121
4.8.1 Implications of an Unbound Organisation .....	122
4.8.1.1 Dissolving Dichotomies with Intra-Action.....	123
4.8.2 Implications for Creating Shared Value.....	124
4.8.2.1 Implications for Shared Value Practice.....	124
4.8.3 Implications for Critical Organisational Scholarship .....	125
4.8.4 Limitations and Way Forward .....	125
5.1 Introduction.....	127
5.2 Reimagining CSV as a Co-Creative Learning Process .....	129
5.3 Aligning this Reimagination in Practice.....	131

5.4 Methodology .....	132
5.5 Participants (Stakeholders) and Data Collection .....	134
5.6 Context of the Study.....	137
5.6.1 Introducing AfriGen: A Cross-Sectoral Partnership Project .....	137
5.7 Findings .....	138
5.7.1 The Emergence of an Institute: Personal Reflection and Engagement with the Founder.....	138
5.7.2 The Collective Emergence of a Partnership – Engagements with Partner Leaders .....	143
5.7.2.1 Can you please tell me how the partnership emerged? .....	144
5.7.2.2 Why do you think the partnership works well?.....	145
5.7.2.3 Do you think it has anything to do with the fact that all three partner leaders are women? .....	148
5.7.2.4 How did you navigate differences that arose in the partnership?.....	148
5.7.2.5 What are your key reflections or takeaways on the partnership thus far? .....	149
5.7.2.6 Why do you think you got involved in this work? .....	150
5.7.3 Contributors to the Program .....	151
5.7.3.1 What would you say is your approach to the program? .....	152
5.7.3.2 How do you hope to make a contribution to the program?.....	153
5.7.3.3 What values are most important to you? .....	154
5.7.4 Implementors.....	155
5.7.4.1 How do you understand your role?.....	156
5.7.4.2 What are your personal values that you think influence the work that you do? .....	157
5.7.4.3 How would you describe your experience in this program?.....	158
5.7.5 Community Beneficiaries.....	160
5.7.5.1 So how have you benefitted from being involved in the program?.....	160
5.7.5.2 What do you think are the most prevalent issues in your community?.....	161
5.7.6 Community Engagement.....	164
5.7.6.1 Let’s talk about community engagement, how do you engage with the local community to help inform the work that you do in the program? .....	164
5.8 Summary of Emergent Themes .....	166

5.9 Discussion.....	167
5.10 Conclusion.....	170
6.1 Pertinent Findings.....	173
6.2 Overall Conclusions.....	173
6.3 Practical Recommendations.....	174
6.4 Research and Methodological Recommendations.....	174
6.5 Limitations of the Study and Avenues for Future Research.....	175
Figure 1: Thesis Overview.....	12
Figure 2: A New Understanding of Shared Value Creation.....	18
Figure 3: Publication count per year.....	25
Figure 4: Overview of Journal Count per Discipline.....	26
Figure 5: Proportion of Conceptual and Empirical Publications.....	26
Figure 6: Conceptual Structure Map.....	27
Figure 7: TreeMap of Publication Title Keywords.....	28
Figure 8: Word Cloud of Conceptual Publication Titles.....	28
Figure 9: Conceptual Framework for the Study of SVC.....	29
Figure 10: Emergent Conceptual Themes.....	30
Figure 11: Methodological Breakdown of Empirical Studies.....	35
Figure 12: Emergent Empirical Themes.....	36
Figure 13: Methodological Breakdown of Empirical Publications on Local Cluster Development....	41
Figure 14: Overarching Conceptual and Empirical Themes.....	43
Figure 15: Business Model Innovation Process in Shared Value Creation.....	46
Figure 16: Using a Process Ontology to Address Shared Value Creation Tensions.....	54
Figure 17: Theoretical Framework Overview.....	62
Figure 18: Representation of Weick's Organising Model. Source: Author's Own.....	79
Figure 19: Graphical Representation of Organising as Transaction Source: Author's Own.....	80
Figure 20: Comparison of Trans-Actional and Intra-Actional Reality. Source: Author's Own.....	82
Figure 21: Study of Organising Phenomena in Process-Praxeology.....	85
Figure 22: The Life-world in the Process-Praxeological Context.....	87
Figure 23: Glauner's Multi-Level Perspective of Business in Society (Source: Author's Own).....	95
Figure 24: A Comparison of CSV in Formal and Informal Enterprises.....	98
Figure 25: The 7 Steps of Digital Storytelling. Source: Author's Own adopted from Lambert, 2013 pgs. 53-57.....	100
Figure 26: Narrative Arc used in Digital Storytelling Workshop.....	101
Figure 27: Coding of Kairotic Actions in Informal Entrepreneur Story Scripts.....	107
Figure 28: Most Prevalent Actions Leading to and Emerging from Opening an Informal Business.	109
Figure 29: Notable Sources of Action Linkages.....	109
Figure 30: From Key Event to Adaptability.....	112
Figure 31: Tangible and Intangible Resources used by Informal Entrepreneurs.....	114
Figure 32: Sources of Emergent Shared Value Creation Narratives.....	116
Figure 33: Catalysts of Business Sustainability and Shared Value Creation in Informal Businesses	117
Figure 34: Representation of an Informal Business Action Net: Shared Value Creation as an Outcome .....	119
Figure 35: Study of Creating Shared Value as an Agential Realist Phenomenon in Process-Praxeology .....	132
Figure 36: Number of codes per Subtheme and Overarching Theme.....	137
Figure 37: Process-Praxeological Phenomena as the Collective of Intra-Actional Lived Experiences .....	167

# CHAPTER 1: INTRODUCTION

*“If things start happening, don’t worry, don’t stew, just go right along and you’ll start happening too”.*

(Dr Seuss)

A philosophical journey is indeed a spiritual one. It is a journey of questioning your assumptions, validating your new perspective, and communicating that in a way that makes sense to you and others. It requires criticality in questioning your existing beliefs, illuminating those that serve you, and reimagining those that don’t.

Conjuring a new perspective is exactly that. It requires such a deep understanding of an ontology that it becomes a part of you, in such a significant way that it shifts your perspective of how you view the world. A new ontological perspective not only changes how you view the world but how you view yourself within the world. It requires processes of deep introspection.

## 1.1 OVERVIEW

The body of work presented in this thesis is a collection of such deep personal reflections entwined with the academic venture of contributing to theory and knowledge. It depicts a deeply transformative journey, a renewed understanding embodied and inseparable from my own experience of the world and my journeying within it. As straw, woven into golden thread, so is this work bound together in a transformative tapestry of purposeful becoming.

The tapestry began its formation shortly after a period of turbulence, followed by becoming a mother for the first time, and a once-in-a-lifetime pandemic. The personal and environmental uncertainty directed me to knowledge-seeking solace. I sought solace in the knowledge imagined as external to my being. Not realising at the time, that this would inevitably lead me back to self. Upon reflection, this journey was intentionally chaotic and was purposed with the navigation of self towards profound personal growth. I’ve come to realise the profoundness of knowledge. As one that is inseparable from self, embodied with personal growth, and ultimately meaningless otherwise.

The change in language and tone in this manuscript from beginning to end is representative of a five-year journey of emotional and scholarly maturity. It is my privilege to take you, the reader on this knowledge-seeking journey with me of both profound personal and theoretical insight. My first chapter

to follow, mostly impersonal, symbolic of an insecure academic voice, begins with unfolding the concept of shared value creation. In its critical assessment, I present a reflection on what has previously been done and the key issues yet to be addressed (Chapter 2). Reflecting on this period, there was a preoccupation with accolades, showcasing an impressive number of resources, diagrams, and analyses. An attempt to go above and beyond the average literature review. From these efforts emerges an evident misalignment between the conceptual intent of the concept of shared value creation and its interpretation in practice, resulting in amplified dualistic tensions between the economic and the social, and business and society. Birthed from a narrative privileging doing more than being, this phase is where my journey is representative of the straw.

The next chapter is slightly less impersonal, a growing confidence in my ability to engage with scholarship. My voice slowly strengthened as the chapter progressed, and as a way forward, I proposed a new direction. As the process that intermittently begins the transformation of straw into gold, this chapter presents the anticipation of a forthcoming shift. A voice affirmed in the form of a new theoretical framework, inspired by process theory, pragmatist philosophy, and agential realism reimagines the organisation as a relational, unbound performativity<sup>1</sup>. Thus, reconceptualising, shared value creation as an organisational phenomenon that is continuously performed, perpetually created and recreated in its emergence (Barad, 2007; Dewey, 1916, 1929a, 1988; Weick, 1979).

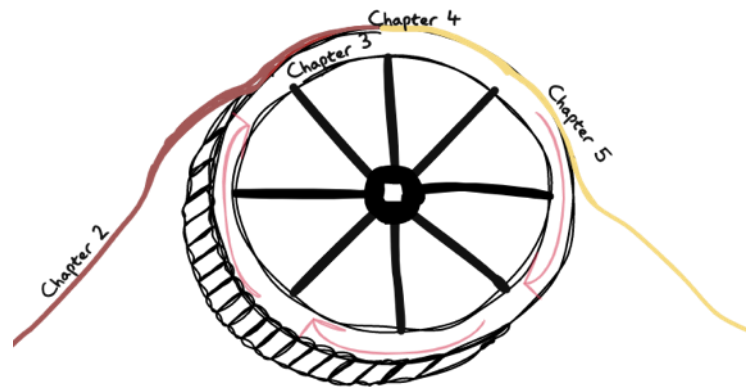
The concluding insight from this chapter calls to action how this reimagination could be operationalised in practice. In pursuit of these practical implications, I pilot this theory using secondary Digital Storytelling data (Chapter 4). More of me now given permission to be exposed to the reader. But still using tried and tested methodologies presented in a standardised structure with formative recommendations. Inspired by Barad's (2007) concept of diffraction, I attempt to unfold the creation of shared value in the "diffracted" context of the informal sector. To theorise on the level of concepts, I apply the recommended analytical framework for studies of process, an action-net analysis to determine whether this context enables new insights for shared value practice (Czarniawska, 2004; Dembek, 2020; Lindberg & Czarniawska, 2006; Lindberg & Walter, 2013; Llewelyn, 2003). These findings illuminate the potential of the theoretical framework proposed by showing how lived experience and an organisation conceptualised as contextually integrated enables shared value to be created and scaled.

But still, questions arose about how shared value becomes a collective. I needed to gain insight into how the creation of shared value unfolded collectively through the lived experiences of multiple participants within the context of an organisation. This led me to an empirical study of shared value

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<sup>1</sup> Performativity here refers to how Barad (2007) conceptualises the term, as dynamic and entangled processes through which reality is enacted in her theory of agential realism. Phenomena becomes materialised from intra-action of matter and meaning.

creation in a cross-sectoral partnership, which is presented in Chapter 5. In the final case study, my voice is now clear, a confident scholar, unapologetically exposing the reflective process and experience of the research. Using a novel form of analysis, I can now confidently assert the insights discovered for future research and propose new directions for the field – transforming into the golden thread.



*Figure 1: Thesis Overview*

Initially, I intended to unify the language and tone throughout this manuscript. But upon reflection, I realised that leaving it as is would allow the reader to authentically experience this transformation through my words. This then brings me to Seuss, the not-so-doctor, doctor. A depiction of the academic imposter I once thought of myself to be. Appropriately encompassing my journey into motherhood, reflecting my toddler's love for the author while expressing that changing the narrative begins with me. The quotes depicted throughout this manuscript are meant to portray to you, the reader, that humour, humility, and sincerity kept me grounded throughout this journey. But also, that my words and actions are entwined and that I could not argue for changing narratives if I was not prepared to take action towards it.

Through this journey, I have become and am still becoming a critical organisational scholar. I situate process-praxeology within the ambit of this scholarship, and it is within this ambit that criticality is not only required for dominant narratives but also its political intent in whether its persistence serves or disserves diverse contexts (Goldman, 2017). We experience this in South Africa as a decolonisation movement in higher education as #feesmustfall, #rhodesmustfall. We've seen this in the renaming of buildings, streets, and even cities and airports to help create distance between the future of the country and its oppressive past. It is within this context that, as an emerging scholar in an emerging economy, I must question the predominant colonialisation of knowledge that has privileged certain voices and contexts, and for me to question its legitimacy to serve our needs.

Organisation studies have favoured structures within traditional, formalised, and Northern contexts. It is organised following the power structures that maintain the social status quo of the periphery and core.

We could question how the privileging of certain realities in these contexts serves the advanced economies' agenda of maintaining a dependency status quo. The way that 'separate development' served the desired status quo of the apartheid government. A paradigmatic scarcity that affords wealth to some at the cost of others. It is within this context that I approach the study of shared value creation. A concept that criticises capitalism as a historical system that institutionalises inequity. The fact that Porter and Kramer's (2011) seminal article began with the words, "capitalism is under siege", is a clear indication that their approach requires a critical lens that both problematises and offers an alternative to the system. Its authors, Michael Porter and Mark Kramer, advocate strongly for its adoption to regenerate the historical injustices of this system in the hopes that a newly transformed, conscious economy will emerge.

As a being, living in the interconnectedness of this physical reality, I have garnered a renewed understanding of how my worldview (ontology) and expression of knowledge (epistemology) are entwined with ethical accountability. Everything, both seen and not seen, is in a continuous emergent process of becoming. That matter, words and self are intimately connected in a dynamic web of what I perceive as my existence. In which history, that which has existed before, of words, that which have been spoken before, and how previous narratives of self, entangle with existing and future existentialities. That I am responsible for creating and recreating my current realised materialisation and, therefore, accountable and ethically liable for remaining critical to what I permit to unfold.

Bestowed with the agency to create and shift knowledge, I now understand that I have an ethical responsibility to drive awareness towards previously suppressed contexts and experiences. I am accountable to the voices that have been previously silenced in the bureaucracy of knowledge.

Understanding oneself as a process-praxeologist involves a deep understanding of an existence beyond this physical, observable world. A self as unbound, dynamic, and intricately entwined to all of life; situated in an ever-emergent context. The adoption of a new ontology begins with the self and then can be extended to the embodied reality within which this self, functions. An interconnected, emergent existence, that reconstitutes and unfolds with each interaction.

So why would this be an insightful ontology with which to view our existence, and the constitution of everything that embodies this existence? Because we are not simple, independent beings, but relational actualities that impart essence and meaning to everything in the world. We emerge as a society, engage as policy, and assemble as organizations. Therefore, all these discursive typologies, are as we are, co-evolving, co-created, boundless, living organisms of infinite potentialities. To demarcate an organization as a distinct entity within the world is to disregard this dynamic complexity of its living and authentic existence.

It is within this reimagination of both self and organisation that I embark on a journey into the study of shared value creation. A concept invested with dualisms of economic and social value yet challenges these dualisms and the very substrate upon which the role of business in society has been based.

It proved an idyllic concept with which to study process-praxeology and bring closure to the questions raised. Through these interconnected studies, I conclude the culmination of these insights in my final chapter with practical, theoretical and future research implications. In this endeavour, we should produce enriching insights that contribute to altered practices. The critical scholarship agenda is not only needed but also long overdue.

As a takeaway, I hope that the reader is inspired to explore phenomena in an unbound world, and diffracted contexts, and leaves with a renewed sense of responsibility in how our ontologies determine what comes to matter. The aim of this work is to contribute valuable insights that transcend boundaries and inspire future research and practice in the creation of shared value specifically, but in critical organisational scholarship more broadly. As the chapters journey through various levels of theorisation, may the magnetism of contextualisation and deep, rich data draw you towards evidencing the gap that critical scholarship in the field is meant to fill.

## 1.2 WHY STUDY SHARED VALUE CREATION IN AN EMERGING ECONOMY CONTEXT?

“Capitalism is under siege”, that’s how Porter and Kramer (2011) began their seminal paper that introduced the concept of Shared Value Creation to the world. They criticized how unsustainable capitalism is and how its continuance not only established but exacerbated inequality. For Porter and Kramer, capitalism is responsible for the gross inequality we currently experience within and between nations.

They appeal to large corporations, having benefitted from the capitalist system, to rethink how they can better serve the communities within which they operate. By proposing a new way of doing business that generates profit and purpose simultaneously, Porter and Kramer (2011) propose the adoption of shared value creation by rethinking the products they create and the markets they serve by redefining value within their value chains to be more inclusive and responsive to environmental and social needs, and lastly by being enablers of local development in geographical clusters that exist within these value chains.

It's important that shared value creation be distinguished from corporate philanthropy and corporate social responsibility frameworks (Kelley et al., 2019). Shared value does not include investment in

community initiatives from existing resources. Creating shared value requires corporates to rethink how they perceive value as mutually economically and socially beneficial, as novel, innovative value streams that intersect with addressing social needs (Glauner, 2019; Porter & Kramer, 2011).

Now, in contexts like South Africa, where capitalism is infused with race and colonialism, rethinking the role of business in society becomes particularly relevant. Especially within the context of gross inequalities and increasing public distrust in government (Edelman, 2023). Evidenced in the latest Trust Barometer Survey conducted annually by Edelman Consulting, it was found that South Africans' trust in government and business is fluctuating and disparate along different income groups. According to the survey, lower income groups have significant distrust in both government and business, while higher income groups responded neutrally to trust in these institutions. While public trust in corporations is markedly higher than in government, it is worth noting that public expectations of the role of business in society continue to change. More than half of South Africans said that they would only buy from brands that resonate with their beliefs and values. On a global scale, close to 70% of employees say that social impact is a strong expectation when considering a company for a job. This shows that both locally and globally, customers and potential employees want more societal engagement from businesses. (Edelman, 2023). South African public opinion places a strong emphasis on businesses having an increasingly social role to lead on issues, collaborate with government, restore economic optimism and be advocates for trust (Edelman, 2023). The literature aligns the public opinion for corporations to drive a social agenda and for the role of government to create an enabling environment for this to occur (Aspelund, 2017; Blowfield, 2012; Glauner, 2019; Hatch & Zilber, 2012; Kanter, 2008). It resonates with the sentiments of Kelley et al. (2019) about how emerging markets have a greater need for corporates to attend to social needs (pg. 180).

The concept of shared value creation is not unfamiliar to large corporations in South Africa, where some have claimed to have adopted these principles. But what would it look like for all corporates in South Africa to take on a more social role? I argue that the answer lies in shared value creation, mutually creating value for both the corporate and the communities within which they operate. To think of corporates as embedded institutions supported by the government and creating economic and social wealth that benefits them financially and contributes to social sustainability. This is the starting point and motivation for this work. Rethinking how, through innovation and redistribution, we can use local resources to contribute to local transformation. What could the potential be for a concept such as shared value creation to shift existing economic and social narratives and trajectories?

The inquiry driving this thesis is how shared value creation is organised within an emerging economy context. The overall purpose of this study is to determine whether shared value creation is meaningful to pursue in this context. Therefore, in seeking to understand how this inquiry is conceptually,

theoretically, and empirically relevant, the next begins the journey with the positioning of shared value creation in the extant academic literature.

# CHAPTER 2: A REVIEW OF THE LITERATURE ON SHARED VALUE CREATION

*“The more that you read, the more things you will know, the more that you learn, the more places you’ll go.”*

Dr Seuss

## 2.1 INTRODUCTION

This chapter critically assesses the concept of Shared Value Creation (SVC), which, in its current definition, includes the rethinking of products and markets, the revisioning of value chains, and the development of local clusters (Porter & Kramer, 2011). Implicitly, the pursuit of shared value ought to lead to the redefinition of the role of business in society by mediating the tensions between creating economic and social value (Dembek et al., 2016). Given the climate and socio-economic emergency we are experiencing, this shared-value quest is an important pursuit – The chapter's main proposition is that the concept SVC serves its intent more fruitfully when it is considered in the open-world ontology of process, rephrased as Creating Shared Value (CSV).

As the chapter navigates through the extensive landscape of the academic literature, questioning the debate of whether it merely repackages old concepts or indeed has transformative potential. Using the framework of a systematic literature review and bibliometric analysis, this chapter critically assesses the plausibility of this argument to ascertain whether and how the discourse on CSV is potentially enabling or restricting progress towards inclusive growth (Jesson et al., 2011).

The analysis presented in this chapter reveals insights into the concept's evolution and implications for the role of business in society. Firstly, there is a disconnect between the conceptual intent of SVC and how it has been endorsed and studied by practitioners and researchers, respectively. Porter and Kramer (2011) envisioned SVC as a catalyst for change in business practice, with reimagined conceptions of value. Their argument for a new form of capitalism, argues for a departure from existing business models and narratives, suggesting an approach of critical scholarship (Goldman, 2017). Their argument resonates with a call to embrace practices of co-creation, innovation, and inclusivity, which the analysis shows becomes realised when a critical approach to existing frameworks and discourses is adopted.

A second realisation emerges from the finding that most empirical studies on SVC have adopted positivist quantitative methodologies. A consequence of this representationalism distinguishes the organisation from its environment. Therefore, absolving the organisation of its social contribution (M. S. Lee et al., 2012). I propose that SVC should be reframed as a dynamic, an intentionally integrative concept whose value becomes realised through a relational approach. SVC is constrained when conceptualised as an entity to be capitalised by business, rather than a process of realising new value streams. Through the analysis, SVC reveals itself as an ever-evolving, collective endeavour that transcends the traditional boundaries of ontological and epistemological understanding. To serve its intent more fruitfully, SVC needs to be reimagined relationally in the open-world ontology of process.

Thirdly, this reimagined ontology offers an opportunity to reconcile the dualistic tensions that have permeated the extant literature, embodied by the extraction of business from society. In this reimagined ontology, business becomes entwined with society, sharing the responsibility of addressing social issues. In this reimagination, social needs become merged with business needs and value assumes a unified purpose of social and economic objectives. Instead of seeking to balance value as distinct, shared value opportunities emerged at the nexus of social and economic value as novel initiatives. A fourth realisation emerges in that SVC cannot be attained when value is understood as distributed, but rather added. Only when value is understood as added can the tensions that have emerged in the extant literature be overcome (see Figure 2).

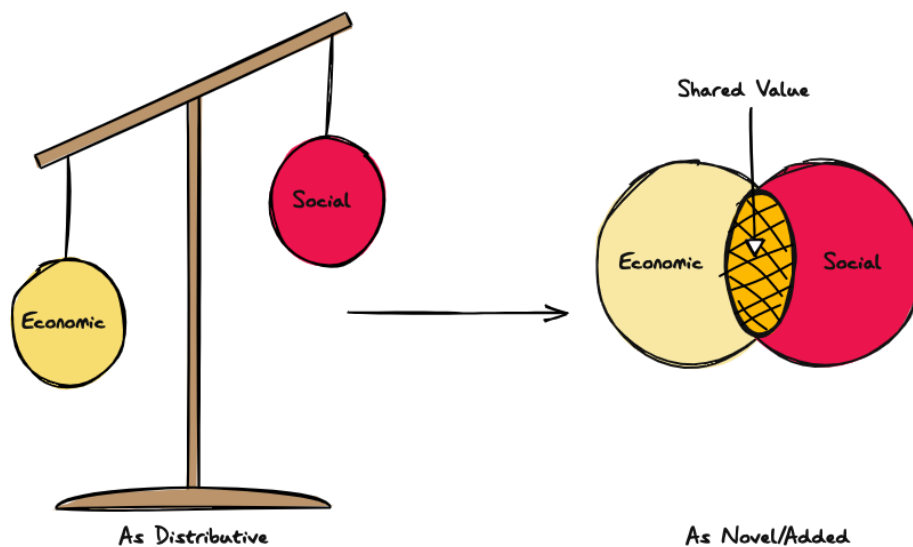


Figure 2: A New Understanding of Shared Value Creation

Another consequence of pursuing SVC from a positivist perspective is revealed in this review as imposing a linear narrative upon the role of business in society (Hernes, 2007). More effectively, an anti-positivist ontology, which conceives of reality as relational, enables an ecosystemic approach to the study of SVC. This not only enables an investigation into the actions and interactions of SVC but promotes the exploration of the phenomenon beyond its previously studied, mainstream contexts. In the literature, SVC has been reserved for the contexts of large corporates and multinationals, with few studies exploring emerging contexts or alternative business models. A need, therefore, emerges in a final realisation – to expand the boundaries of studying SVC beyond these dominant contexts. Characterised by ecosystemic narratives, the informal sector emerges as an uncharted dimension for the potential study of SVC.

Adopting a process view to further the concept of SVC and sieving through a discourse of dualisms, a redefinition of the organisation's role and contribution to social value I proposed by reimagining SVC in an organisation that is emergent and entangled within its social context. The chapter advocates for critical scholarship in the pursuit of SVC in exploring its study in underexplored contexts and the potential these insights may hold towards a critical organisational scholarship.

## 2.2 THE CONCEPT OF SHARED VALUE CREATION

The emergence of the concept of shared value creation began with Michael Porter and Mark Kramer's 2011 article that remarked on how capitalism was under siege. Porter and Kramer are both renowned professors from Harvard University in their respective fields of competitive strategy and social impact. The term combines their expertise to mutually create social and economic value as a competitive strategy. This is based on the view that businesses are increasingly seen as contributing to exacerbating social issues. The concept intends to reconceptualise capitalism beyond its existing, antiquated, and narrow view. For Porter and Kramer (2011), capitalism was perceived as the major cause of social, economic, and environmental problems for the sake of profits. Porter and Kramer coined the term 'shared value creation' initially in 2006, which they later defined as "policies and operating practices that enhance the competitiveness of a company while simultaneously advancing the economic and social conditions of the communities in which it operates" (Porter & Kramer, 2011: 239).

According to the definition provided by Porter and Kramer, shared value creation is realised across three dimensions of corporate strategy and activities (Porter & Kramer, 2011). The first dimension is in the reconceptualisation of a corporation's existing products and markets. They provide the example of exploring the Bottom-of-the-Pyramid (BOP) for new market opportunities (Porter & Kramer, 2011). Porter and Kramer (2011) argue that corporations could expand into new markets by offering frugal forms of their products to supply the BOP. This would create shared value by enabling new market-

shares for corporates while simultaneously providing much-needed goods and services to a previously underserved market (Aspelund, 2017; Berti & Mulligan, 2016; Porter & Kramer, 2011; Saul, 2010).

Another dimension through which shared value creation is realised is by redefining productivity in the value chain. This entails that corporations revisit their existing value chains to determine where certain products or processes could be locally sourced. Porter and Kramer (2011) promote value chain localisation to support the development of local businesses. Shared Value Creation (SVC) is positioned as a strategic business imperative that requires organisations to redefine how they measure performance across the value chain (Mcintosh et al., 2016). The objective of the value chain dimension of SVC is to promote inclusive business in terms of both customers and suppliers in low-resourced communities (Azmat et al., 2015). Enhancing and enriching the value chain requires multiple levels of participatory investment. Glauner (2019) makes the argument for resource-creation and value-added participation principles applied to micro, meso, macro and supra-levels of the economy. Where micro-level creation and participation in the value chain concerns the interactions between the company and people; the meso-level concerns interactions between companies; macro-level creation and participation concerns interactions between companies and the wider socio-economic system within which they operate; and lastly, supra-level creation and participation in the value chain concerns the interactions between the company and the environment (Glauner, 2019: 504).

The final dimension through which SVC is realised is in the development of local clusters. Porter and Kramer (2011), suggest that corporates prioritise the communities within which they operate, whether that entails a value chain cluster or sourcing products or processes in the neighbouring locality to enhance economic and social development in the community. These include building supportive industry clusters at the company's locations (Berti & Mulligan, 2016; Saenz, 2019). Cluster development initiatives are intended to identify and promote geographical concentrations of the firm's related business activities. As an extension of the value chain dimension of SVC, local cluster development is meant to build local capabilities, generate employment and lead to improved localised infrastructure by moving the processing of raw materials to a local community (Alcaraz & Hollander, 2019; Blowfield, 2012; Saenz, 2019; Wachira et al. 2020).

### 2.2.1 CONCEPTUAL CRITICISMS

The concept of SVC has been criticised as being unoriginal and reductionist. The literature reveals a reference to SVC as a “management buzzword”, likened to concepts such as social innovation, stakeholder theory and blended value (Crane et al., 2014; Dembek et al., 2016: 1). The concept is largely assimilated to or contrasted with corporate social responsibility, suggesting that, in the literature, SVC

is perceived as situated within the corporate sustainability discourse (Crane et al., 2014; McIntosh et al., 2016; Mirvis et al., 2016; Sial & Doucette, 2020; Wachira et al., 2020). Situating the SVC concept within this discourse, rather than as the overarching business strategy described by Porter and Kramer (2011), suggests a potential misalignment of how the concept has been defined and how it has been interpreted in the literature.

Another key criticism is that the concept of SVC is reductionist. Crane et al., (2014), argue that in its current articulation, SVC downplays the tensions between social and economic goals. These tensions between economic and social value are at the core of SVC, where business needs to generate profit intersect with addressing social needs. Navigating these needs is a complex process, which Crane et al. (2014) argue that Porter and Kramer (2011) do not deal with directly. The relevance of this tension is illuminated in the SVC literature by Harvey and Bice (2014), McIntosh et al. (2016), Mendy (2019), Moon and Parc (2019), Sanzo-Perez et al. (2015), and Tinarwo and Uwizeyimana (2019).

Crane et al. (2014) also argue that the concept overlooks complexity in value chains by positioning social and environmental needs above supply longevity. Navigating SVC in the value chain cannot be simplified by this ranking but requires iterated negotiation of needs and sustainable supply, which are complexly integrated. Addressing these could mutually address a sustainable source of suppliers and unmet social and environmental needs that could impact the sustainability of these sources. Porter and Kramer's (2011) definition of redefining productivity in the value chain is argued to have overlooked this complex integration (Crane et al., 2014).

A criticism of SVC, which could also be viewed as an overlooked, unintended consequence, emerges in the dimension of local cluster development. Crane et al. (2014) point out that SVC fails to address the social embeddedness of corporations and how the development of local clusters may lead to local dependencies on certain businesses or industries or accentuate local inequalities. Although these unintended consequences could likely emerge, proponents of SVC would argue that stakeholder engagement helps reduce the likelihood for these consequences to occur. This approach is largely supported in the literature in that the local cluster development dimension of SVC is inseparable from engaging with local stakeholders (Berti & Mulligan, 2016; Blowfield, 2012; Castro-Martinez & Jackson, 2015; Colovic et al., 2019; Fernández-Gómez et al., 2020; Glauner, 2019; Kanter, 2008; McIntosh et al., 2016; Mirvis et al., 2016; Strand & Freeman, 2015; Yoon, 2017).

Crane et al. (2014) present another criticism of the SVC concept for reflection in its naivety for the challenges of business compliance. This is a complex issue in the context of Multinational Corporations but may not be the case for localised businesses. In the literature on corporate social innovation, it is argued that the government should play an enabling role in supporting and facilitating corporations in

their social innovation initiatives (Bocken et al., 2015; Elena & Herrera, 2015; Howaldt & Schwarz, 2017; Jager & London, 2019; Langley et al., 2013; Michelini, 2012; Mumford & Mumford, 2010; Sanzo-Perez et al., 2015; Saul, 2010; Tabares, 2021; Vézina et al., 2018). It could be argued that the same approach could be applied in relation to SVC. In the South African context, programmes such as Broad-based Black Economic Empowerment, the Strategic Partnership Programme, the Special Economic Zone Programme and the Agro-Processing Support Scheme could arguably be positioned as SVC enablers, which incentivise corporates to localise and develop suppliers, local enterprises, and geographical clusters they are located in (Broad-Based Black Economic Empowerment Act 53 of 2003, Special Economic Zones Act 16 of 2014).

Another criticism of SVC presented by Crane et al. (2014) is its claim to address the systemic problems of capitalism through micro-level behaviours. Although a reinvention of capitalism is a large claim that Porter and Kramer (2011) make, this criticism is overcast in the extant literature on SVC (Azmat et al., 2015; Dionysios & Tsoukas, 2013; Howaldt & Schwarz, 2017; Langley et al., 2013; Ratner, 2020; Teece, 2007; Vaara & Whittington, 2012; Whittington, 1996). Proponents of shared value creation ascribe to the value of collective micro-level actions and interactions as drivers of systemic change (Bendig et al., 2018; Regnér, 2008). The criticism is substantiated only when the firm is viewed as an entity isolated from its environment rather than socially embedded. Various authors, such as Alcaraz and Hollander (2019), Dacin et al. (1999), Dyer and Singh (1998), Obaze (2020), Regnér (2008), Saenz (2019) and Whittington (2007) support this view that social embeddedness is implicit in the shared value creation concept.

Ultimately, an indicator of the impact and value of the SVC concept is how it has been popularised and taken up by practitioners. For example, large international corporations such as Nestlé, Unilever, Toyota, and IBM have redefined shared value creation as their business purpose (Pfizer et al., 2013). The Shared Value Initiative, established in 2011 by Porter and Kramer's consulting firm, FSG, has expanded globally with the establishment of associate initiatives in Hong Kong, Africa, and India. The initiatives are structured as communities of practice that bring together business leaders, practitioners, and academics to share their knowledge and experiences of aligning profits with social impact (FSG, n.d.). Even if SVC is merely a repurposed concept, the way it has transcended the academic-practitioner-civil society boundaries and illuminate the collective social impact is a valuable contribution worthwhile investigating (Aspelund, 2017; Bulcke et al., 2020; Elena & Herrera, 2015; Kanter, 2008; McEvily et al., 2003; Mion & Beghini, 2020; Yoon, 2017).

## 2.3 SYSTEMATIC REVIEW OF THE LITERATURE ON SHARED VALUE CREATION

The rationale for adopting a systematic methodology for reviewing the literature on SVC is twofold. Firstly, to verify and extend Dembek et al.'s (2016) systematic review of the shared value creation literature, and secondly, the recommendation of having a detailed record of systematic processes that consolidate the extent of literature when dealing with novel concepts (Jesson et al., 2011). This literature review aimed to apply rigorous, systematic approaches to review both conceptual and empirical scholarly contributions to shared value creation in terms of how the concept has been conceptualised, operationalised, and empirically investigated in organisational scholarship. When undertaking a systematic review of the literature, it is recommended that the reviewer already has a working knowledge of the concept and field (Jesson et al., 2011). This knowledge was developed during the proposal stage of the research project, which resembled a traditional review to scope the extant literature (Jesson et al., 2011).

The scoping review revealed that the literature articulated SVC as three interchangeable terms. These were “shared value creation”, “creating shared value”, and “corporate social innovation”. These terms informed the Boolean terms upon which this systematic review is based. The systematic review methodology was informed by the Campbell Collaboration Method, as well as other systematic reviews conducted within the field of Management and Organisational Studies (Adams et al., 2016; Dembek et al., 2016; Dionisio & Raupp De Vargas, 2019; Donthu et al., 2021; Galvagno & Dalli, 2014; Hoque & Rana, 2020; Maestre-Matos et al., 2020; Stewart et al., 2015).

The review of the literature was carried out by first conducting a search of each scoping Boolean term, informed term using the academic database Scopus® and Web of Science®, restricted to the following inclusion criteria:

- a) published in academic journals, irrespective of field.
- b) published from 2011 to current.
- c) published in the English language, and
- d) in its final stage of publication

The following table provides an indication of the number of sources yielded for each search phrase:

Table 1: Search Terms and Results

Search Term	Number of Sources Yielded
Creating Shared Value	141
Shared Value Creation	61
Corporate Social Innovation	26
<b>Total Sources for Evaluation</b>	<b>228</b>

A total of 228 citations were derived from 106 different source titles. The list of citations was then consolidated and cleaned by removing duplicate citations. This yielded a final list of 199 citations for inclusion in the review. A rating criterion was then developed and applied to each citation based on the publication title and abstract and guided by the Campbell Collaboration Method. The rating criterion was defined in relation to relevance. Either an explicit reference to shared value creation was applied as defined by Porter and Kramer (2011), or an implicit reference was made to social and economic value creation. This approach of inclusion based on relevance rather than quality was guided by a systematic review done by Adams et al. (2016) supported by Boaz and Ashby's (2003) "Fit for Purpose" approach. The rating criteria and results are defined in Table 2 below:

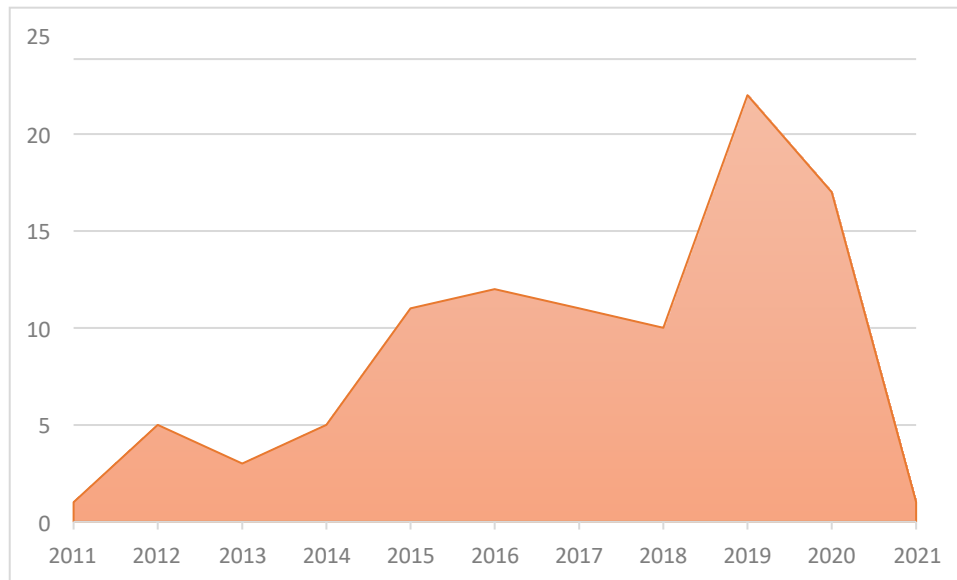
Table 2: Review Rating Criteria Defined with Results

Rating	Criteria Defined	Results of Applied
<b>Relevant</b>	Abstracts that referred to the shared value creation concept as per Porter and Kramer's definition	98
<b>Partly Relevant</b>	Abstracts that referred to shared value in the CSR/CSI context but not directly as per Porter and Kramer's definition	33
<b>Irrelevant</b>	Abstracts that referred to shared value as synonymous with principles, as values that are shared.	68

All publications that were rated as relevant according to the criteria defined in Table 2 were included in the review for further analysis. The application of this criteria filtered the list of 199 citations to 98, which were then included in the review for more in-depth analysis.

### 2.3.1 DESCRIPTIVE SUMMARY OF RELEVANT PUBLICATIONS

The graph depicted in Figure 3 below represents the number of articles published per year that met the criteria defined in Table 2 above and were included in the results of the Boolean terms indicated in Table 1.



*Figure 3: Publication count per year*

As depicted in Figure 3 above, a noticeable increase in publications was evident in 2019. Considering that Porter and Kramer's article was published in 2011, the surge in publications on shared value creation could be indicative of the economic crises of 2018, increased technological advancements, and corporate sustainability discourse that emerged in 2018-2019.

Evidently, the academic contributions to shared value creation are noted to be widely distributed. The 98 articles selected were published in 66 separate journals, indicating a wide distribution of publications on SVC, with a mean distribution of 1,48 articles per journal. Fifty-four journals provided one article each, and twelve journals provided two or more articles. Within the sample, most publications were represented in the Management Studies discipline. This is followed by Technology and Innovation and then Development (Figure 4). The dominance of the management discipline reflects the current context of shared value creation as popularised in the practitioner landscape.

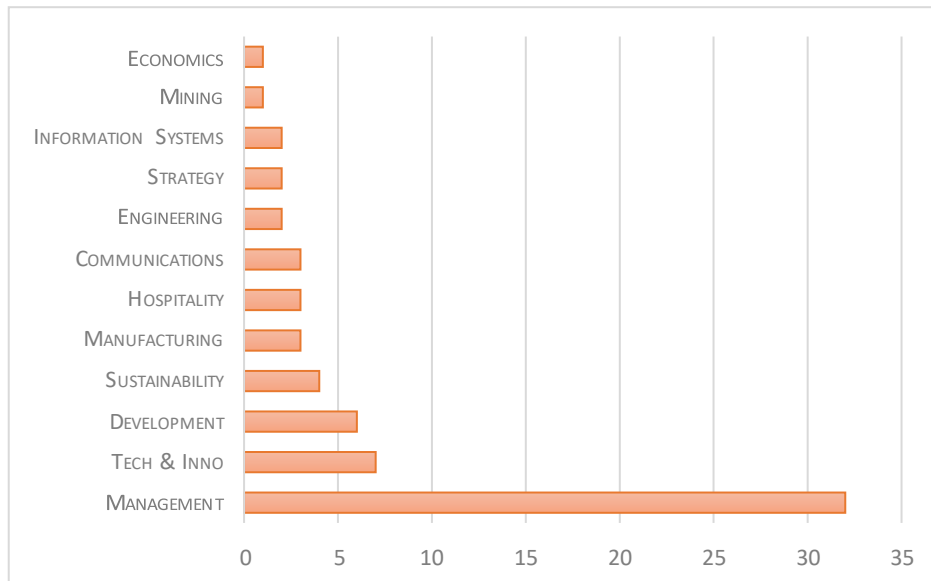


Figure 4: Overview of Journal Count per Discipline

Four journals, Sustainability, Corporate Social Responsibility and Environmental Management, Competitiveness Review, and the Journal of Cleaner Production, accounted for more than a third (35%) of all relevant publications. This concentration of publications indicates the literary debate of SVC as situated within the sustainability discourse.

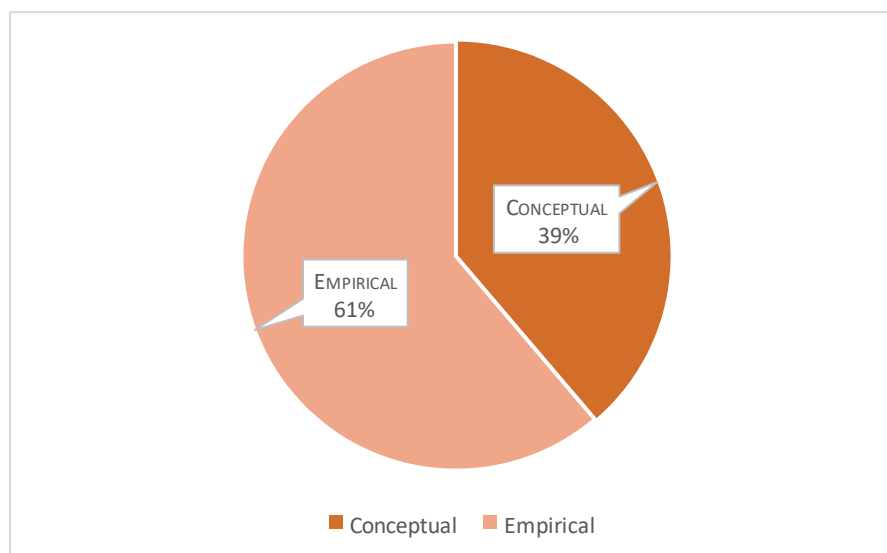


Figure 5: Proportion of Conceptual and Empirical Publications

Interestingly, a larger proportion of empirical contributions were present in the relevant publication's list. Based on the novelty of the SVC concept, it was presumed that a larger proportion of conceptual contributions would be present in the literature. However, the larger proportion of empirically based publications is suggestive of the concept's popularity and uptake, as there are sufficient instances to permit the empirical study of shared value creation.



Using the same software, a TreeMap was generated to indicate the frequency of title keywords in the selected conceptual publications (Figure 7). By omitting words that directly refer to SVC, the Figure reveals that the most frequently occurring keywords represented in the publication titles frame the concept as a social (9%), corporate initiative (8%), that involves innovation (4%) within the context of sustainability (4%) and development (3%) (Sahoo et al., 2021). Figure 8 presents these findings in a word cloud format.

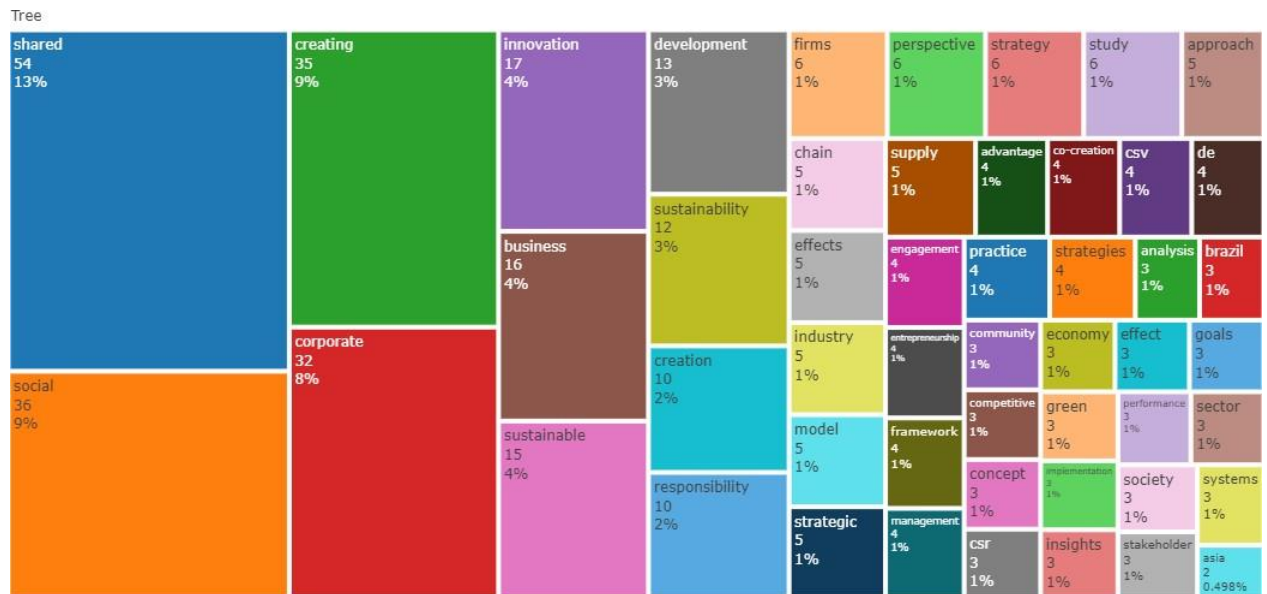


Figure 7: TreeMap of Publication Title Keywords



Figure 8: Word Cloud of Conceptual Publication Titles

## 2.4 CONCEPTUAL FRAMEWORK DEVELOPED

Based on the conceptual overview, the selected conceptual and empirical publications were thematically categorised, informed by an extended framework of the three shared value creation dimensions as depicted in Porter and Kramer's model. This extended framework is illustrated in Figure 9 below. The extensions to Porter and Kramer's framework were informed by the emergent thematic analysis of both empirical and conceptual publications, represented in the diagram by means of dashed lines.

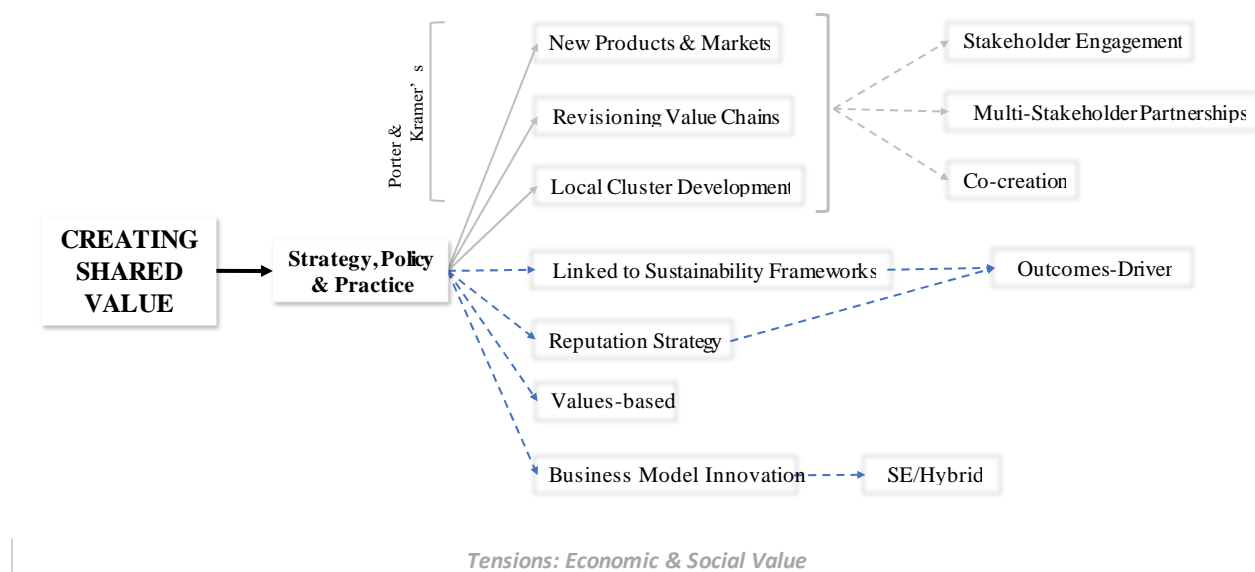


Figure 9: Conceptual Framework for the Study of SVC

This framework was then applied first to publications that contributed conceptually to SVC and then to publications that presented an empirical study of SVC. The contributions are discussed respectively, followed by a discussion of overarching themes in the conceptual and empirical literature.

### 2.4.1 OVERVIEW OF CONCEPTUAL CONTRIBUTIONS

Below is a graphical representation of the various conceptual thematic contributions of each of the thirty-eight conceptual articles of the selected publications (Figure 10). More than one quarter (26%) of selected conceptual publications sought to frame SVC within existing sustainability frameworks. This included linking SVC to existing Corporate Social Responsibility or Corporate Social Investment initiatives. These publications did not distinguish SVC as a novel corporate strategy but as synonymous or as an extension of existing corporate sustainability initiatives. The second and third most prominent conceptual contributions include articles that sought to clarify the concept of SVC (21%) or address the tensions between economic and social value creation (16%) inherent in the SVC concept.

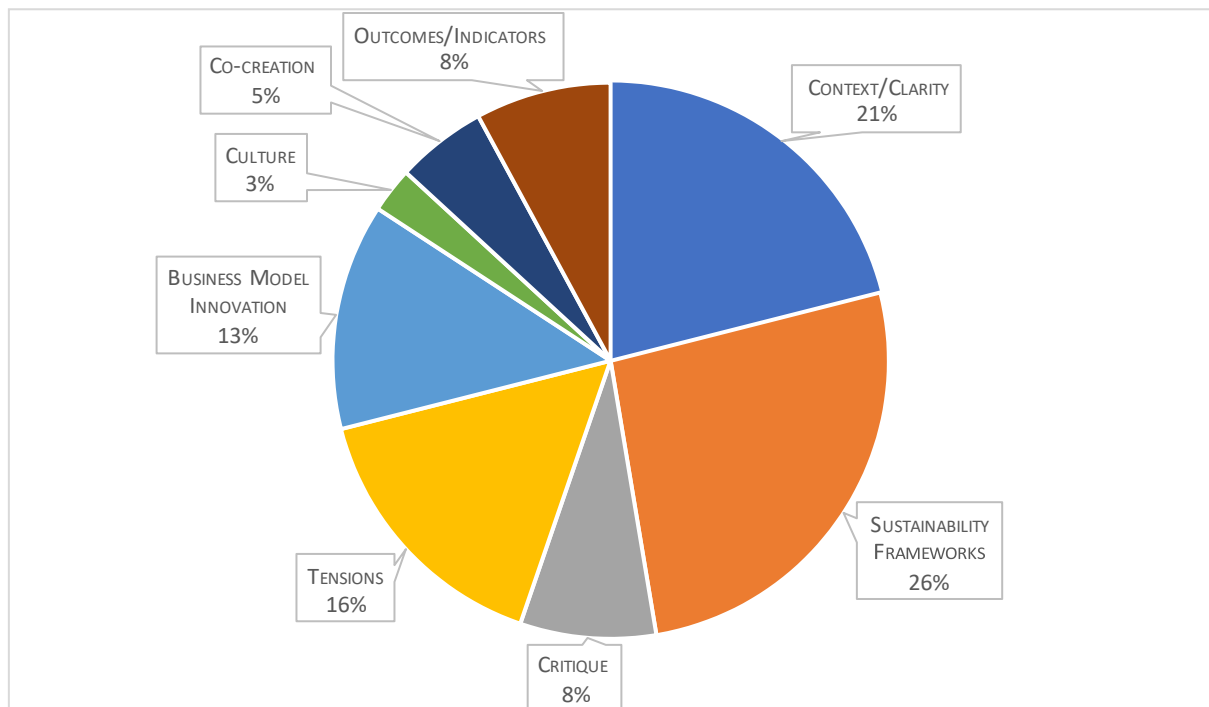


Figure 10: Emergent Conceptual Themes

#### 2.4.2 DISCUSSION OF CONCEPTUALLY-SPECIFIC CONTRIBUTIONS

In reviewing the conceptual literature, analysis was focussed on the ontology of concepts and their hermeneutics, that is, how the concept has been interpreted in the extant literature. To explore the question of what shared value creation is, this review sought to understand how SVC has been defined, criticised, and developed in the literature. A discussion of conceptually-specific themes emergent in the literature follows.

##### 2.4.2.1 Clarity and Context

Publications that were grouped under the conceptual theme of clarity and context (21%) include literature reviews, such as the works by Dembek et al. (2016), Dionisio and Raupp De Vargas (2019) and Maestre-Matos et al. (2020) sought to gain insight into the shared value concept by consolidating various complementary streams of literature. Their contributions situate SVC within the corporate social responsibility discourse and social innovation discourse. Their collective contributions conclude that, although the SVC concept is novel, it is rooted in preceding ideas such as blended value, mutual benefit and stakeholder theory (Crane et al., 2014). They seem to overlook the collective expertise of the creators of the SVC concept as an indication of its meaning. Porter, being a renowned scholar in the study of competition and competitive strategy and Kramer, an equally renowned scholar in the field of corporate philanthropy, suggests that SVC is intended as a fusion of competitive philanthropy, in which corporates “do well by doing good” (Tabares, 2021: 3). The purpose of SVC is for companies to enhance

their competitiveness while simultaneously advancing the economic and social conditions of the communities within which they operate (Saenz, 2019: 1352).

Abdulkader et al. (2020) conceptualise SVC within the context of a value system of open innovation. They situate SVC in relation to value creation, value capture, and value chains, which consequently infers a meaning of sharing a firm's existing value rather than creating new, collective value streams. Porter and Kramer (2011) make explicit that SVC entails new value creation that requires a shift in existing conceptions of value in the capitalist sense. Both Porter and Kramer (2011) and Saenz (2019) argue for the prioritisation of societal needs to create shared value. Saenz (2019) recognises that shared value requires a social dimension to a firm's value proposition, in that companies should seek to address customer and social needs and be cognisant of not only how their value chain impacts society but how social issues could affect their value chain activities. Saenz (2019) contributes a "synergy of societal progress and value chain productivity" to the SVC concept (p. 1352).

Another interesting way in which the concept was defined was in its conceptual application to different contexts. Authors Amin-Chaudhry (2016), Blowfield (2012), Chikazunga (2013), Kelley et al. (2019), Tabares (2021), and Voltan et al. (2017) contextualise the shared value creation concept in emerging economies. As a concept both developed in and largely applied in the Global North, these contributions offer an expanded understanding of SVC by contextualising it in low-resourced settings. Blowfield (2012) does this by critically reflecting on the role of business as a development agent. What he finds is that a firm's response to social needs is determined by how they perceive themselves in relation to poverty. He outlines three positions where firms could identify as victims of poverty, the cause of poverty, or as solutions to poverty. Depending on which position the firm ascribes to determines their adoption of socially impactful projects. Ascribing to the position of victim causes disadvantages to the firm in its understanding of international development issues and the explicit impact these issues have on core business activities. For Blowfield (2012), development is as much a corporate issue as it is for society, arguing that businesses play a more engaging, proactive role as development agents. Development is as much a corporate issue as it is a social issue. Poor majorities are unavailable markets, and low education and skills mean that positions cannot be filled. He presents the Ethical Trading Initiative as an example of a business taking on an active role in social improvement by supporting only ethically sourced products and production standards. This demonstrates the business as an engaged agent of development, responsive to stakeholder concerns, pressures and demands (Blowfield, 2012).

Some authors sought to clarify the concept of SVC within the context of collaboration or innovation. Saenz (2019), for instance, places emphasis on the role of learning in creating innovative ways to realise shared value. Saenz (2019) argues that shared value creation is operationalised through an exchange of knowledge and learning with stakeholders internal and external stakeholders (Lee et al., 2012; Spitzack

& Chapman, 2012). In terms of collaboration, authors such as Mirvis et al. (2016) and Saenz (2019) emphasise the prevalence of collaboration with external stakeholders as essential to creating shared value. For them, these stakeholders help the firm not only understand local contexts and markets but also to access unfamiliar markets to create shared value. Leveraging social ties enables companies to seek increased social impact in shared value-creation activities (Mirvis et al., 2016).

#### *2.4.2.2 Tensions between Economic and Social Value*

Publications that were grouped under the conceptual theme of tensions (16%) addressed the inherent tensions between economic and social value that surfaced in the concept of shared value creation. This tension extended to the wider debate on the role of business in society. Blowfield (2012), Jose (2016), McIntosh et al. (2016) and Moon and Parc (2019) argue that existing conceptualisations of the peripheral role of business in society are problematic to the realisation of shared value creation. They propose that a fundamental shift is needed in how businesses view their role in relation to social issues. Blowfield (2012) highlights some of these issues when considering the role of business as development agents, whose extent of impact, he argues, is largely attributed to how the business perceives its role. Only when businesses see themselves as the cause or solution to poverty do they take actionable steps to resolve it by creating shared value (Blowfield, 2012).

McIntosh et al. (2016) argue that the purpose of business in relation to society needs to be re-envisioned and that value needs to be reengineered to realise SVC. They argue that social trust in organisations will remain fragile unless business and social objectives can be reconciled, and a new business paradigm emerges. A paradigm that requires an integration of for-profit and non-profit objectives. Not integrating SVC as a core business strategy plays out as a reactive response to counterbalance the negative effects of the business only operating to pursue profits. For McIntosh et al. (2016), the organisation must redefine its purpose and make sustainability its overarching strategy. Florin and Schmidt (2011) address the tensions between social and economic value as “strategic paradoxes”, which they argue can only be overcome when the business model and the impact model are integrated to transform a strategic paradox into a strategic advantage (Florin & Schmidt, 2011: 166).

Moon and Parc (2019) rephrase SVC as Corporate Social Opportunity (CSO) to reconcile the tension between economic and social value. They argue that this rephrasing focuses on SVC's potential opportunities for integrating business with society. They visualise SVC as a continuum between Corporate Social Responsibility (CSR) and Corporate Social Opportunity (CSO), essentially inferring SVC as a process that navigates along this continuum. For Moon and Parc (2019), not only is a shift required in the mindset of corporates and their role in society but in the mindset of civil society from a

beneficiary to a co-creator. Although there is no explicit value in Moon and Parc's (2019) rephrasing of CSR as CSO, their contribution is valuable in prioritising opportunities that emerge when contemplating SVC as a proactive approach.

Jose's (2016) interview with a leading businessperson in an emerging economy reveals the contemplations of these tensions in practice and leadership. The interview respondent positions social issues as secondary to business purposes, for which they can only offer a supportive role. The respondent reveals how the business has institutionalised social value as a separate philanthropic arm, suggesting that, in practice, social and economic value cannot be reconciled (Jose, 2016).

When Porter and Kramer (2011) argued that capitalism was under siege, it is suggested that they were referring not only to the narrow capitalist definition of value but also to how this system has framed the boundaries between business and society. They address the problem that capitalist conceptions of value distinguish business from society and, thereby, economic from social value. This is evident in Jose's (2016) interview with a leading businessperson, which is problematised in the contributions by Blowfield (2012), Florin and Schmidt (2011), McIntosh et al. (2016) and Moon and Parc (2019).

SVC aims to reset the boundaries of capitalism by connecting firm success with societal improvement and, in that, opening new opportunities to serve social needs. SVC offers businesses opportunities to gain efficiency, create differentiation and expand to new markets (Lee et al., 2012) by proposing an integrative, interdependent view of business and society rather than the distinct view imposed by capitalism (Porter & Kramer, 2011). Instead, SVC recognises that societal needs define markets and that social harms create internal costs for firms (Porter & Kramer, 2011). What Porter and Kramer (2011) propose as a reinvention of capitalism is inferring a proposal for a reinvented role of business in society.

#### *2.4.2.3 Conceptual Implications*

Key conceptual implications arise from these attempts at clarifying and contextualising the concept of shared value creation. The use of terms such as synergy, collective value, competitive philanthropy, and mutual benefit suggests a transcendence of for-profit and non-profit boundaries, inferring a social responsibility upon the traditional role of corporates. This fusion of boundaries and roles is indicative of a process ontology, even though an ascription to process is not explicitly positioned by these authors. A key theme that resonates across these contributions is the dissolution of dualisms, which is characteristic of process.

Shared value creation reflects various markers indicative of an ontological intent of process. Redefining products and markets suggest that existing, often capitalist-inspired definitions of products and markets do not adequately serve the needs of an integrated business and society. When Porter and Kramer (2011) argue for a repositioning of products and markets, they argue that value not only be considered within the physical boundaries of the firm but extend along the value chain. They infer an ecosystemic approach to value creation that mandates a relational view of the organisation (Kramer & Pfitzer, 2016; Porter & Kramer, 2011; Schweik et al., 2013). Revisioning the organisation as unbound aligns more closely with the intent of shared value of intersecting customer needs with the needs of society.

Various authors problematise some of the inherent contradictions in the concept, which could be resolved by revising shared value creation as process-oriented. Florin and Schmidt (2011), in their study of hybrid business models, refer to the paradox in the strategic intent of shared value, as emergent tensions arise when attempting to create mutual wealth. Dembek et al. (2016) address the dichotomous views of business and civil society in their perception of SVC and propose continuous and extensive engagement with multiple stakeholders to identify synergistic areas of value creation. Berti and Mulligan (2016), in their study of Food Hubs, demonstrate how local embeddedness plays a critical role in creating economic mutual advantage for producers and consumers. Their study revealed that while there is no generic model for Food Hubs to create shared value, the fact that they are embedded within local contexts means that they distribute food by merging strong “social connections, relationships and education” (Berti & Mulligan, 2016: 18).

Another observation in the extant literature is the problems that emerge when SVC is interpreted dualistically. Strand and Freeman (2015) dichotomise stakeholder and shareholder value, value creation and value capture, arguing that these positions focus on the redistribution or decentralisation of wealth rather than its conceptual intent of added wealth creation. Even though Saenz (2019) acknowledges the interdependence between the firm’s success and social welfare, he still refers to the tension that SVC imposes between “short-term costs” and “long-term externalities” and, in doing so, highlights the separation of the firm from its external environment (p.1352). Shared value creation becomes diluted when these dichotomies cannot be dissolved. Blowfield's (2012) study on business as development agents addresses this problem. He argues that in practice, such businesses tend to define their agendas in terms of development discourse but still view these through a business lens, unable to consolidate these discourses in practice (Blowfield, 2012).

Another example in the literature that demonstrates a dualistic interpretation of SVC is in Castro-Martinez and Jackson's (2015) study of community trusts in football clubs. They address the tensions experienced in football clubs in needing to uphold their social responsibilities while ensuring the economic viability of the club. Football clubs institutionalise this dualism by establishing a separate

entity, i.e., a community trust, to manage the social aspects of the club. This is a misalignment of SVC as a unifying principle meant to entwine social and economic value rather than dissect it. As observed in Castro-Martinez and Jackson's (2015) study, the objectives of SVC are not sufficiently realised when interpreted as dualistic strategic objectives. They propose that shared value creation in football clubs is more effectively realised if they embed a social strategy that seeks to generate both social and economic value, driven by a genuine desire to go beyond solely financial objectives, that emerges from a collaborative, virtuous cycle of joint action (Castro-Martinez & Jackson, 2015).

#### 2.4.3 OVERVIEW OF EMPIRICAL CONTRIBUTIONS

Sixty publications offered empirical contributions to the study of shared value creation. The research methodology of each of these articles was classified as either adopting qualitative methodologies such as case studies and interviews, quantitative methodologies involving surveys, mixed methodologies or document content analysis (Figure 11). Two of the articles could not be classified according to methodology and were categorised as not applicable. Both articles were opinion pieces.

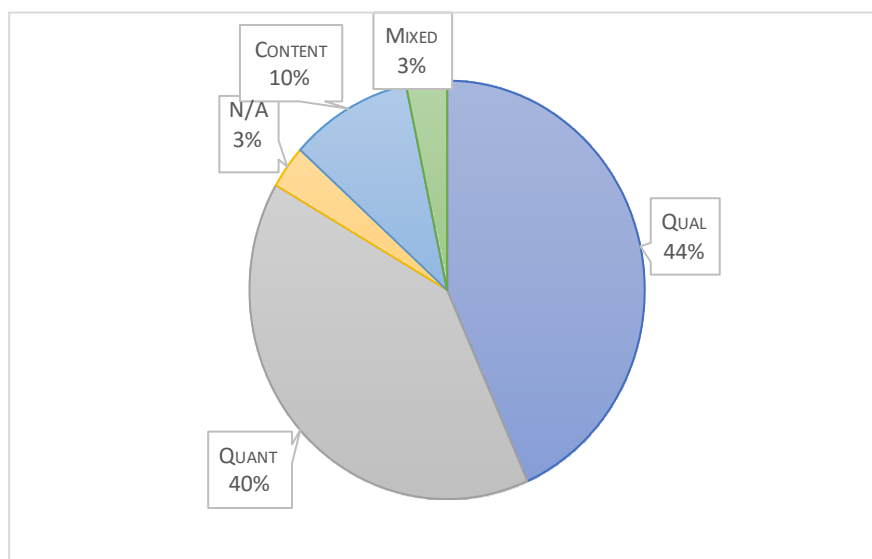


Figure 11: Methodological Breakdown of Empirical Studies

Publications that adopted qualitative methodologies comprised mostly of single case studies (54%), followed by multiple case studies comprising more than two cases (23%). The remaining studies were made up of two cases (12%), embedded cases (8%) or cross-sectional studies (4%). Publications that employed quantitative methodologies conducted econometrics or statistical analysis purposed at compiling indicators for measuring shared value creation (13%). Most publications employed the distribution of survey instruments to collect data. The sample sizes of these studies and their relative proportion to all quantitative studies in the publications included are provided in Table 3:

Table 3: Sample sizes of Quantitative Empirical Studies

Sample Size <sup>2</sup>	%
Less than 100	33,3
100-200	19,0
201-400	14,3
401-600	19,0
More than 601	14,3

Below is a graphical representation of the various contributions of each of the sixty empirical articles in the selected publications (Figure 12).

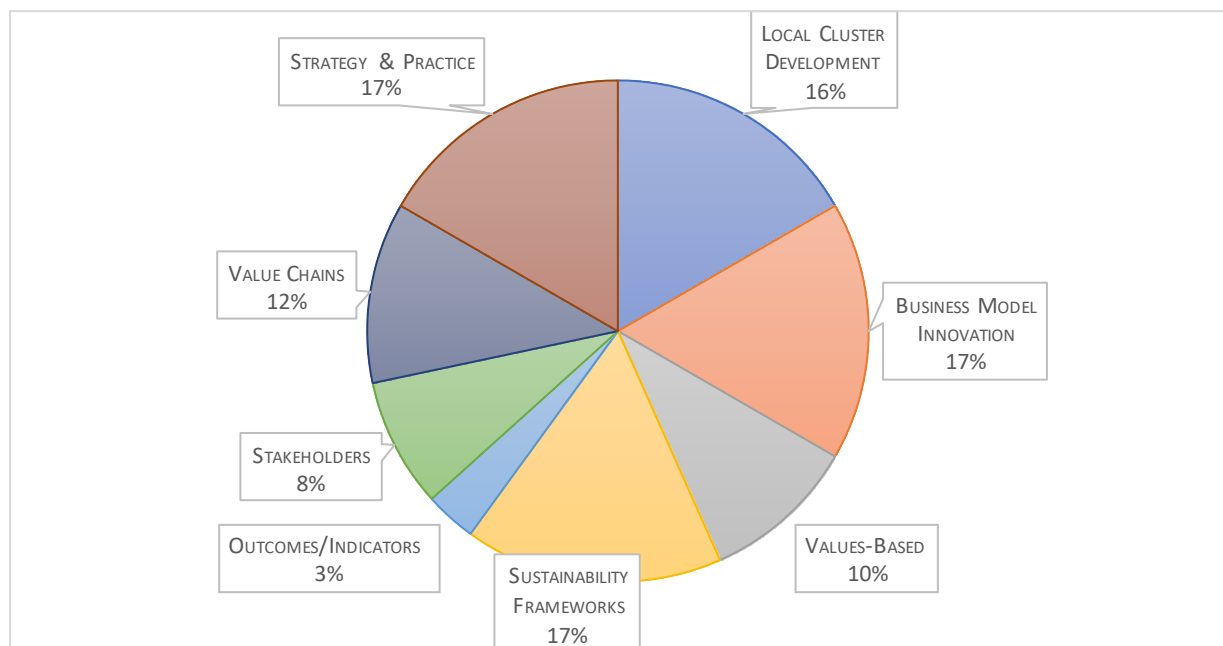


Figure 12: Emergent Empirical Themes

In terms of the sixty publications that sought to contribute empirically, there were three areas that featured the most prominent. The first was in linking SVC to existing sustainability frameworks (17%) such as Corporate Social Responsibility or Corporate Social Investment. The second was in framing SVC as an innovation in the firm’s existing business model (17%), these included models of social entrepreneurship and hybrid business models, this was equally prominent in studies of SVC as realised in strategy and practice (17%).

<sup>2</sup> Three publications were removed prior to the calculation, these include indicator, econometric analysis, and non-applicable studies.

#### 2.4.4 DISCUSSION OF EMPIRICALLY-SPECIFIC CONTRIBUTIONS

In reviewing the empirical literature, analysis was focussed on how shared value creation was studied by the authors in relation to organisational activities presented in cases and examples. This review sought to understand the epistemological consideration of shared value creation in the literature, how the concept was operationalised in the studies, as well as the contributions and limitations of the research paradigms and methodologies selected for the study of shared value creation. A discussion of these empirically-specific themes emergent in the extent literature, Strategy and Practice, and Value Chains follows.

##### *2.4.4.1 Strategy and Practice*

One of the primary differences between shared value creation and corporate social responsibility, highlighted by Porter and Kramer (2011) is in how each approach is framed in relation to risk. Shared value is meant to proactively approach risk by addressing social needs, whereas CSR is largely reactive to risk and tends to prioritise firm reputation. The publications grouped under the empirical theme of strategy and practice (17%) indicate a conflation of this distinction, seeking to align shared value creation either with financial performance, competitive advantage or within the context of reputation and risk. Of the ten publications grouped under this theme, seven account for the adoption of quantitative methodologies.

Fernández-Gómez et al. (2020) and Yoon (2017) explore the correlation between SVC adoption and financial performance. Yoon (2017) found that a positive correlation was attributed to unconventional management, practices, and structures, which aligned with the personal values of the owner. The owner revealed that the goal of business was to serve society, defined the social nature of business, and its constitution as a social institution. Fernández-Gómez et al. (2020) defined SVC in terms of sustainability variables and conducted a correlation analysis to determine its relationship to financial performance. Although the study found a positive correlation, it imposes a reductionist view on shared value creation as a sustainability initiative, which limits its extension to affect systemic change in the tourism context of their study.

Alcaraz and Hollander (2019) and Kanter (2008) explore the adoption of SVC as a competitive strategy within the context of medium-sized firms and Multinational Corporations, respectively. Alcaraz and Hollander (2019) present their study of SVC as implemented in a medium-sized firm, which undertook an initiative to address the need for a shortage of skills in the industry. Their approach sought to identify educational shortcomings in the organisation and develop solutions that addressed these issues at a broader social level. The firm had framed SVC as a competitive strategy, to meet social needs

strategically, which improved firm competitiveness. The initiative developed was successfully scaled, simultaneously addressing the firm's skills shortage and shortcomings within the education system. Kanter (2008) presents a study of MNCs pursuing social value agendas. The study revealed fluid organisational structures that organised resources around problem-solving rather than specific tasks or functions. These contributions demonstrate how SVC, when framed as a competitive strategy, guides needs-driven approaches, extending beyond the organisation's boundaries. In addition, traditional organisational structures are not conducive to shared value creation, which is nurtured in a novel and unconventional environment.

Spitzeck and Chapman (2012) argue that most firms approach social impact from a perspective of risk rather than value or opportunity, an observation that they support with findings from their study of Multi-National Corporate partnerships in emerging economy contexts. A review of the grey literature reveals a similar observation. The sustainability reports of three large South African retail firms that have espoused SVC indicate their use of materiality assessments in identifying risks to mitigate in their sustainability initiatives. These firms frame shared value creation as an incentive to minimise risk, realised as a risk mitigation strategy. Materiality analysis facilitates a process of identifying social needs that impose a risk to the business and enables strategies to be tailored to address areas where social needs and business needs intersect (Saenz, 2019). Although scholars support the use of materiality assessments for SVC, it is only when social value, rather than social risk, is prioritised in the assessment that sustainability outcomes align with the intent of shared value creation (Blanchard & Gray, 2019; Corazza et al., 2017; Laudal, 2018; Saenz, 2019).

Reputational risk is one of the risks that SVC is framed to address (Moon & Parc, 2019). For both Fernández-Gómez et al. (2020) and Serra et al. (2016), SVC presents an authentic approach to restoring and enhancing a firm's reputation. As an alternative to Corporate Social Responsibility (CSR), which only enhances a firm's branding and reputation, SVC presents an additional opportunity for firms to prioritise social impact (Blowfield, 2012). CSR and corporate philanthropic initiatives have often been viewed as superficial attempts to improve reputation. Still, the nature of SVC as a strategy, purposed for the mutual benefit of both firm and society, has been framed as a more direct and authentic approach to enhancing corporate trust (McEvily et al., 2003; McIntosh et al., 2016; Muthuri et al., 2012; Porter & Kramer, 2011).

The literature reveals that strategy and practice enable the creation of shared value if its concept is framed within the context of competitiveness and is needs-driven rather than driven by opportunity or risk. Studies adopting a quantitative methodology reveal a reductionist view of shared value creation, either defined in terms of variables or reduced to correlate to risk or financial performance (Fernández-Gómez et al., 2019; Font et al., 2016; Saenz, 2019). Studies that adopted qualitative methodologies in

the form of in-depth or longitudinal case studies reveal enablers of shared value creation, such as SVC conceptualisation and needs-based approaches (Alcaraz & Hollander, 2019; Kanter, 2008; Yoon, 2017). These findings suggest that representationalist epistemologies grounded in positivism limit the full extent of SVC to be studied. The abstraction of the organisation from society, as distinctly bound in representationalism, suggests that shared value creation as a phenomenon cannot be effectively studied within the boundaries of an organisation (Barla, 2021; Hultin, 2019; Sandberg & Tsoukas, 2020).

#### *2.4.4.2 Redefining Value Chains*

Porter and Kramer (2011) identify redefining productivity in the value chain as one of the three dimensions through which shared value creation can be realised. They suggest redefining resource use, energy use, logistics, and procurement as three areas where corporations could begin redefining their value chain productivity. They present examples of leading corporations that have created shared value by reducing their use of energy and resources by localising their logistics and providing the development of small enterprises by outsourcing to lower-wage suppliers (Porter & Kramer, 2011). The shared value created by redefining productivity in the value chain realises that corporations affect and are affected by social issues. The value chain dimension of SVC encourages corporations to conceptualise value beyond the boundaries of the organisation to consider how value is integrated and extended to various stakeholders within the value chain. The publications grouped under the empirical theme of value chains (12%) addressed the value chain dimension of shared value creation. Of the ten publications grouped under this theme, six indicated the use of quantitative methodologies, with the remaining four using qualitative methodologies.

A common theme of integration emerged across these publications, although this was made in reference to different contexts. Glauner (2019) refers to integration in the context of participation, with the aim of enriching multiple links in the value chain. Mirvis et al. (2016) reflect on integration in the context of knowledge exchange as a practice that enables SVC to emerge for multiple stakeholders. Azmat et al. (2015) refer to the integration of tangible and intangible resources as a key driver of successful SVC strategies for low-resourced social entrepreneurs who rely on social capital to mobilise their value chains. Bulcke et al. (2020) and Salo (2015) address the need for integrative approaches and methodologies in the formulation of SVC strategies. Salo (2015) highlighted the need to incorporate both top-down and bottom-up approaches to formulate long-term, successful SVC strategies. Bulcke (2020) presented the use of social return on investment and life cycle assessments to undertake the mapping of impact pathways of SVC initiatives.

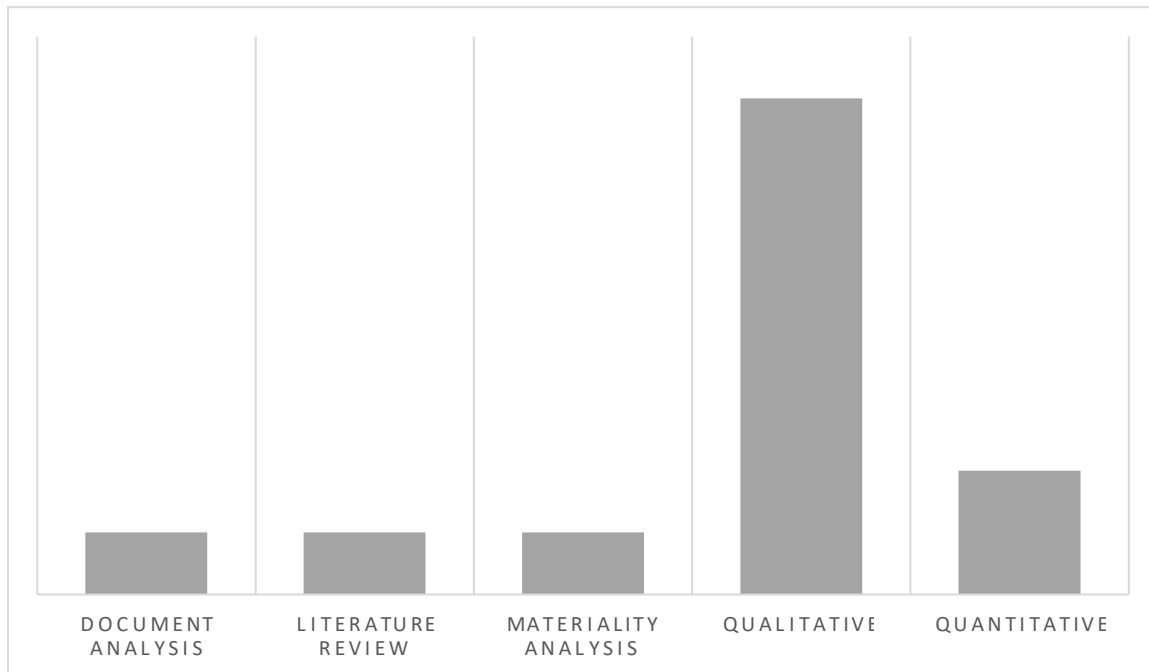
The value of the prioritising integration in the value chain dimension of SVC is that it highlights the nonlinear nature of SVC uptake in practice, particularly in formulating and assessing initiatives. These contributions reveal that shared value creation should encompass inclusive growth in its value chain dimension. Both Azmat et al. (2015) and Bulcke et al. (2020) demonstrate an understanding of SVC not as value that is shared but the creation of added value, which is consistent with how Porter and Kramer (2011) have conceptualised SVC. Integration in the value chain dimension also explores the scaling of shared value as an outcome of organisational boundary dissolution.

These contributions of shared value creation in the dimension of redefining productivity in the value chain show the integrative, deterritorialised, nonlinear nature of SVC that resonates with the adoption of an open-world ontology of process.

#### *2.4.4.3 Enabling Local Cluster Development*

When Porter and Kramer (2011) address local cluster development as a dimension of shared value creation, they encourage companies to evaluate their supply and distribution networks, even training and educational institutions, to identify potential geographic clusters. The idea is for companies to identify gaps or weaknesses within these clusters that, if addressed, would lead to improved productivity and growth for the company while enhancing localised infrastructure and development for clusters (Porter & Kramer, 2011).

The publications grouped under the empirical theme of local cluster development (16%) addressed the enabling local cluster development dimension of shared value creation. Thirteen publications were grouped under this theme. A breakdown of the research methodology and scope is provided in Figure 13 on the next page:



*Figure 13: Methodological Breakdown of Empirical Publications on Local Cluster Development*

Most publications (61,5%) employed qualitative methodologies for the study of local cluster development, of which five employed a single case study, and the remaining three employed an embedded, longitudinal, and cross-sectional case study, respectively. The two studies that employed quantitative methodologies had samples of 130 and 163, respectively. Interestingly, this is the only empirically specific theme that employed mostly qualitative methodologies. This could suggest that the Local Cluster Development pathway of SVC may be more closely associated with social initiatives, therefore, a preference for adopting qualitative methodologies that are more suited to navigating complex social issues (Czarniawska, 2008; Gill, 2014; Symon & Cassell, 2012).

A salient theme of inclusion resonated across these publications; this was supported by processes of co-creation, which led to the implementation of new practices. In terms of inclusion, both Alberti and Belfanti (2019) and Berti and Mulligan (2016) address inclusion as a central component of enabling local cluster development. For Alberti and Belfanti (2019), local cluster development is enabled by the inclusion of multiple stakeholders in engagements with informal SVC. Berti and Mulligan (2016) view SVC's value chain and local cluster development dimension as integrated processes in that local cluster development is enabled when marginalised value chain actors are included in developing SVC initiatives. They provide an example of how a collective of small-scale and rural farmers were included in the value chains of industry leaders through nested markets (Berti & Mulligan, 2016).

These markets were more inclusive of smaller organisations and enabled them as a collective to create more value for larger corporations and the communities within which these smaller producers were located (Berti & Mulligan, 2016).

Embedding inclusion for local cluster development informs the emergence of new practices, such as the establishment of intermediaries to create nested markets and instituting corporate goals around social needs, as well as adopting co-productive processes in determining value creation (Alberti & Belfanti, 2019; Berti & Mulligan, 2016; Fernández-Gámez et al., 2020). Alberti and Belfanti (2019) and Berti and Mulligan (2016) advocate for co-productive processes beyond organisational boundaries to inform both the model and scale of value creation. Ultimately, these collective empirical contributions to the local cluster development dimension of SVC demonstrate that the adoption of a novel approach requires novel practices to enable its realisation.

#### 2.4.5 DISCUSSION OF EMPIRICALLY-SPECIFIC IMPLICATIONS

Some concluding reflections of the empirically specific contributions discussed above suggest a misalignment of SVC intent upon adoption and its realisation or implementation in practice. Upon adoption, SVC intent resonates more closely with Porter and Kramer's (2011) provocation for a unified business and society that is values-based, needs rather than opportunity or risk-driven, encompassing a novel approach to business. This is the contribution made by Alcaraz and Hollander (2019), Berti and Mulligan (2016), Kanter (2008), Saenz (2019), Salo (2015), and Spitzeck and Chapman (2012), who provide empirical evidence that supports the role of multiple approaches to inform SVC strategy. However, when it comes to implementation in practice, evidence has found that SVC is largely measured (quantitative), translated to risk mitigation or reduced to address public perceptions of corporate trust (Blanchard & Gray, 2019; Corazza et al., 2017; M. Á. Fernández-Gámez et al., 2020; Font et al., 2016; Laudal, 2018; Serra et al., 2016; Yoon, 2017).

The use of quantitative methodologies reduces the concept of SVC to measurable variables, which leads to an oversimplification of the inclusive, competitive, and integrative processes involved in creating value of mutual benefit. Studies that have adopted qualitative, in-depth methodologies have been found to contribute novel insights that have surfaced the complexities of SVC in practice. Alberti and Belfanti (2019), Azmat et al. (2015), Barla (2021), Berti and Mulligan (2016), Bulcke et al. (2020), and Hultin (2019) all provide novel insights into circularity, co-production, multiple-stakeholder engagement, establishing intermediaries and the integration of the various dimensions of SVC as enablers of creating shared value. The shift from value creation that is shared towards added, co-created value resonates as a recurring theme that has emerged from these novel, empirical insights.

## 2.5 OVERARCHING THEMES

This section presents a discussion of themes that have emerged across the conceptual and empirical contributions of the selected publications. The following themes and their respective contributions and implications will be addressed in the section below. The cross-cutting themes are depicted in Figure 14:

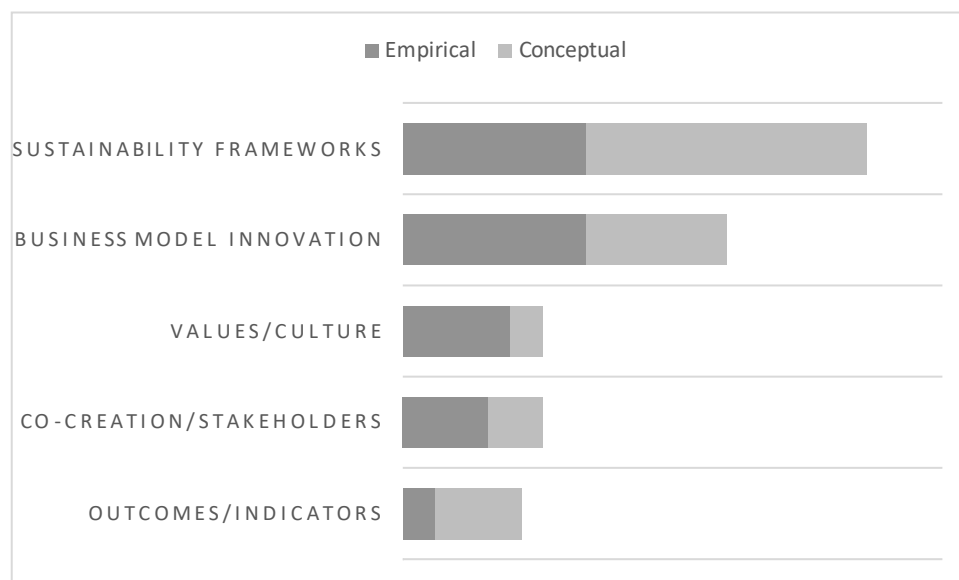


Figure 14: Overarching Conceptual and Empirical Themes

### 2.5.1 SITUATING SHARED VALUE CREATION WITHIN SUSTAINABILITY FRAMEWORKS

The publications grouped under the theme of sustainability frameworks comprised 26% conceptual and 17% empirical contributions. The literature reveals that SVC has been interpreted as a supplementary strategy to enhance the competitive advantage of the firm, primarily at the project or initiative level, or as a subset of Corporate Social Responsibility (CSR) (Azmat et al., 2015; Blowfield, 2012; Fernández-Gómez et al., 2020; Jose, 2016; Lankoski & Smith, 2018; McIntosh et al., 2016; Mirvis et al., 2016; Moon & Parc, 2019; Serra et al., 2016; Smorodinskaya et al., 2017; Spitzeck & Chapman, 2012; Voltan et al., 2017).

Dembek et al. (2016) article on a systematic review of the literature looks at whether SVC is merely a redefinition of CSR or whether it is novel in premise. The article concludes that SVC is a novel premise but requires a revision towards the purpose of business and a reengineering of value for all stakeholders. SVC is conceptualised within the literature as an impactful social pillar of CSR. As some scholars have argued, it is also discussed as a novel way to conduct business in an advanced form of capitalism rather than restricted as an anti-capitalist movement (Crane et al., 2014; Dembek et al., 2016).

The review reveals that SVC is often contrasted to CSR to provide clarity on its definition and the nature of SVC as a differentiation strategy (Atiq & Karatas-Ozkan, 2013; Azmat et al., 2015; Colovic et al., 2019; Elena & Herrera, 2015; Jose, 2016; Mirvis et al., 2016; Moon & Parc, 2019; Nam & Hwang, 2019; Serra et al., 2016; Song & Chun, 2015; Wieland, 2017). Table 4 below outlines some of these key distinguishing factors:

*Table 4: Differences noted in the Literature between Corporate Social Responsibility and Shared Value Creation*

<b>Corporate Social Responsibility (CSR)</b>	<b>Shared Value Creation (SVC)</b>
Risk-focussed	Value-focussed
Reactive	Proactive
Community as beneficiary	Community as asset
Responsive	Innovative
Philanthropic	Competitive
Obligatory	Strategic
Corporate governance only	Links corporate governance to business purpose
Expense for Firm (Cost-centred)	Value for Firm (Profit-centred)
Social value at the periphery	Social value at the centre
Corporate interest	Corporate and Social Interest

CSR and SVC are distinct, and failing to distinguish these paradigms will result in SVC being situated at the periphery of organisational strategy. Porter and Kramer (2011) envisioned that SVC be integrated throughout the firm and embedded at the core of the organisation. Doing so will not only stabilise trust between business and society but rightfully situate SVC as a strategic business imperative rather than a philanthropic endeavour (Mcintosh et al., 2016; Porter & Kramer, 2011).

Another enabler of SVC is for companies to "develop a cluster of suppliers in order to improve the overall stakeholder value across their network" (Mcintosh et al., 2016: 13). Aligned to with Porter and Kramer's (2011) proposition of recreating capitalism, Mcintosh et al. (2016) promote an evolution of capitalism in the form of shared value creation. This evolution, they argue, requires that sustainability become the nature of business rather than just another one of its objectives (Mcintosh et al., 2016: 14).

These contributions suggest that SVC enables the adoption of a new perspective on business's role in society, shifting from shareholder to stakeholder value creation (Bulcke et al., 2020; Mcintosh et al., 2016; Strand & Freeman, 2015). In comparison to CSR, SVC becomes framed as the progressive evolution of corporate sustainability frameworks, leading to the creation of new paradigms for how businesses conceptualise their role in society.

## 2.5.2 OUTCOMES AND INDICATORS OF SHARED VALUE CREATION

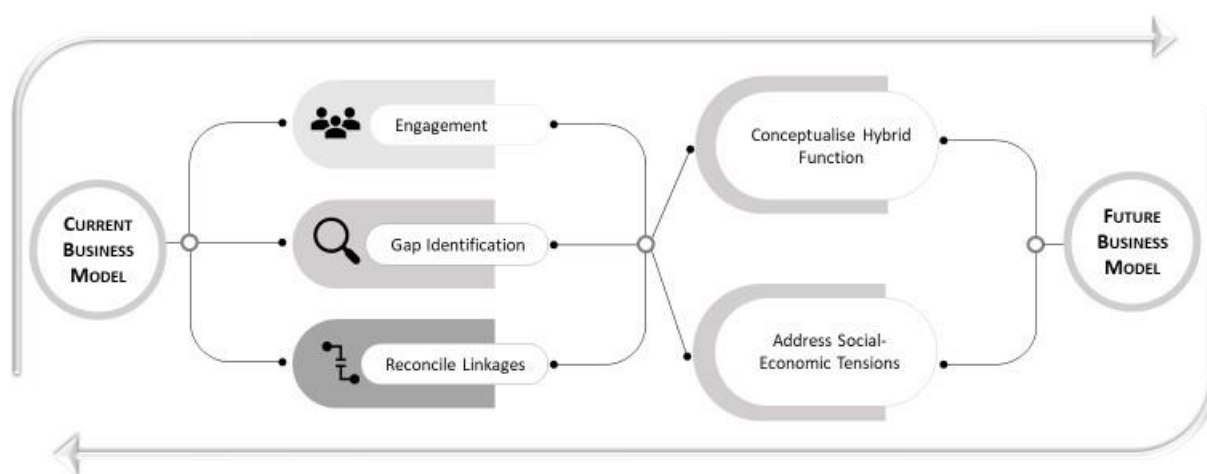
This review positions the cross-cutting theme of Outcomes and Indicators as a subset of the theme of Sustainability Frameworks. In some instances, SVC is framed as an outcome of corporate social responsibility (Hatipoglu et al., 2019). The publications grouped under this theme comprised 8% conceptual and 3% empirical contributions. This theme collectively groups publications that refer to shared value creation with respect to impact, outcomes, or indicators.

The literature reveals contrasting views in framing outcomes, impact, and indicators within the context of measuring and monitoring SVC progress. On the one hand, SVC is framed as distinct from business operations, requiring separate indicators for monitoring. On the other hand, SVC is framed as integrated with business operations, in which progress is monitored in alignment with existing performance indicators. Dembek et al. (2016), in their review of the SVC literature, frame their study on shared value in terms of the indicators used by a firm to measure shared value results. Park et al. (2019) advocate for this kind of measurement but add that measurement should be standardised through the development of SVC indicators. Contrastingly, both McIntosh et al. (2016) and Strand and Freeman (2015) promote that the measurement of SVC should be aligned to existing key performance indicators to enhance adoption on multiple levels of the organisation, which should also be included in processes of stakeholder engagement. For Saenz (2019), both environmental and social outcomes should be integrated into business strategies.

The literature promotes a reconsideration of shared value outcomes from the perspective of needs. According to Dembek et al. (2016), shared value outcomes should establish measurement at the level where needs are met. They argue that an imperative starting point for adopting SVC is to clarify the means, outcomes, and beneficiaries of shared value outcomes (Dembek et al., 2016). Azmat et al. (2015) and Lee et al. (2012) present interesting perspectives on shared value creation and outcomes. Lee et al. (2012) argue that shared value is a process and should not be framed in terms of outputs or outcomes, while Azmat et al. (2015) present the processes that lead to SVC as an outcome. Their study on social entrepreneurs in subsistence marketplaces revealed how bricolage strategies led to inclusive growth and SVC outcomes (Azmat et al., 2015).

### 2.5.3 BUSINESS MODEL INNOVATION

The publications grouped under the crosscutting theme of business model innovation in shared value creation comprised 17% empirical and 13% conceptual contributions. Empirical contributions mostly adopted qualitative methodologies (66,7%). The theme of business model innovation in both conceptual and empirical contributions discuss hybridity and linkages in the context of addressing tensions between social and economic value creation. These publications also contribute to the framing of need identification as a source to inform hybrid business structures. The connection between these concepts is illustrated in Figure 15 below:



*Figure 15: Business Model Innovation Process in Shared Value Creation*

As depicted in the figure above, business model innovation is intended as an iterative process. Smaller firms and hybrid business models tend to more easily navigate this process in shared value creation (Berti & Mulligan, 2016; Strand & Freeman, 2015). Most of the business models presented in the literature discuss either social enterprises or the hybridity needed in corporate enterprises to enable shared value creation (Azmat et al., 2015; Berti & Mulligan, 2016; Blowfield, 2012; Florin & Schmidt, 2011; Glauner, 2019; Kanter, 2008). This positions innovative business models as enablers of SVC.

The contributions frame stakeholder engagement, gap identification and linkage reconciliation as key processes that collectively and simultaneously inform a hybrid business model function needed to address the emergent social and economic tensions of SVC (Azmat et al., 2015; Blowfield, 2012; Colovic et al., 2019; Florin & Schmidt, 2011). Navigating these tensions and clearly defining a hybrid function then informs the structure of the new business model in which stakeholder engagement and gap identification become interconnected. Both Berti and Mulligan (2016) and Florin and Schmidt (2011) discuss how the identification of social needs should intersect with the identification of market gaps. When this is done, business models can be framed to address institutional voids that create mutual value for business and society.

In terms of linkages, the literature discusses how internal and external relationships need to be reconciled. Internally, businesses should consider innovations, such as intermediaries presented in the Food Hub case study or implement co-opetition to link global and local value chains (Berti & Mulligan, 2016). The breakdown of linkages external to the firm is largely portrayed in the literature as a key constraint to creating shared value. Blowfield (2012) argues that the relationship between business and poverty is needed yet absent in narratives describing the role of business in society. Azmat et al. (2015), Fernández-Gómez et al. (2020), Florin and Schmidt (2011), Kanter (2008), Mirvis et al. (2016) and Yoon (2017) argue for linking social and business objectives, the internal firm to external conditions, and public to private value creation. Reconciling these linkages enables new narratives of value to emerge that are symbiotic and added rather than shared (Florin & Schmidt, 2011; Moon & Parc, 2019).

#### 2.5.4 VALUES, CULTURE AND LEADERSHIP

The publications grouped under the crosscutting theme of values and culture comprised 10% empirical and 3% conceptual contributions. A salient trend in this theme is the role of corporations and how culture shapes shared value creation. Even though Porter and Kramer (2011) express that shared value is not about personal values, the role of leadership still emerged as another salient theme in the literature.

The literature reveals leadership behaviour as a key enabler of shared value creation. In a study on leaders who undertook SVC initiatives, Mion and Beghini (2020) found that the adoption of these initiatives was traced to the ethical behaviour of leaders throughout the organisation. They concluded that SVC was derived from virtuous leader behaviour. Similarly, Strand and Freeman (2015) argue that managerial ethics is an important factor in the adoption of shared value creation. Blowfield (2012) argues for a strong link between SVC and leadership in that SVC is driven by individuals who believe in it. He argues that the ethics and morals of individual organisational actors become essential components for enabling SVC (Blowfield, 2012). This point is supported by Jose (2016), who attributes organisational ethics to the role of leaders.

The role of leadership in driving corporate values that support SVC was found to play a central role in successful adoption. Kanter (2008) presents a study of MNCs pursuing social value agendas, which demonstrates this centrality of leadership and values in SVC. A clear understanding of values was evidenced to be enshrined in these corporates, which resonated with clarity throughout the organisation (Kanter, 2008). A study by McIntosh et al. (2016) similarly found that one of the distinct properties of SVC adopters was the prioritisation of values effectively driven by individuals and leaders who believed in its purpose.

In terms of culture, Alcaraz and Hollander (2019), Castro-Martinez and Jackson (2015), and Mion and Beghini (2020) advocate for novel leadership styles and values that enable a culture shift towards shared value. Alcaraz and Hollander (2019) support Kramer and Pfizer's (2016) proposal for systems leadership, in which shared value operates within an ecosystem rather than solely internal to the firm. For Castro-Martinez and Jackson (2015), distributive leadership has the potential to inspire a culture of intrapreneurship, which drives shared value creation throughout the organisation. Kanter's (2008) study also revealed how employees became more intrapreneurial when organisations invested in a culture of SVC. Fernández-Gómez et al. (2020) and Saenz (2019) advocate for shared value creation to be included in corporate culture. They argue that the pursuit of SVC requires new thinking and actions driven by the collective culture of the entire organisation. This is supported by McIntosh et al. (2016) and Font et al. (2016), who argue that SVC is realised when embedded into corporate culture.

### 2.5.5 CO-CREATION AND STAKEHOLDER ENGAGEMENT

The publications grouped under the crosscutting theme of co-creation and stakeholders comprised 8% empirical and 5% conceptual contributions. Co-creation and stakeholder engagement are framed as tools to address a new conceptualisation of value creation when SVC is adopted. The literature positions stakeholder engagement as a co-creative strategy to attain shared value. The adoption of SVC necessitates new engagement processes that lead to participatory approaches to understanding needs and co-creative shared value solutions. These contributions frame SVC as a dialogical process between business, society, and multiple stakeholders.

The framing of SVC as a mutually beneficial outcome for firms and society places stakeholder engagement as a key enabler that inspires innovative ways of economic and social value creation (Berti & Mulligan, 2016; Dembek et al., 2016; Florin & Schmidt, 2011). SVC is meant to engage various stakeholders in a "socially relevant innovation system" (Mirvis et al., 2016: 5015). Strand and Freeman (2015) reiterate this relationship between stakeholder engagement and innovation when they define SVC using stakeholder theory's "jointness of interests" (pg. 65). In their study of mapping stakeholder relationships in Scandinavian firms, Strand and Freeman (2015), demonstrate how relationships between companies and stakeholders have evolved from competitive to cooperative advantage in the creation of joint firm and community value.

According to Berti and Mulligan (2016), Lee et al. (2012), and Strand and Freeman (2015), the language of shared value creation is largely based within the context of competition rather than cooperation, co-production, co-competition or co-innovation. These terms suggest the collective and collaborative processes involved in the creation of shared value. It also suggests how the role of discourse shapes SVC throughout the organisation. When co-creative processes are prioritised in SVC, it leads to value

creation beyond traditional survival and profits to value creation as nested in systems of human needs (Dembek et al., 2016). This revisioning of value creation enables solutions to emerge that involve multiple actors to achieve shared goals and integrate them with sustainable local development (Berti & Mulligan, 2016).

When co-creative processes are structured to identify opportunities for SVC, exchanges of learning emerge. These exchanges, which include insights, skills and resources, have been shown to extend beyond profit and non-profit, private and public-sector boundaries, and even boundaries between competitors (Strand & Freeman, 2015). Co-creation is framed as a process to inform areas for value and enable the construction of solutions (Mirvis et al., 2016; Strand & Freeman, 2015). Co-creation emerges from engagement with multiple stakeholders, in which collective exchange and social learning enable the emergence of new solutions to broad-based complex problems (Saenz, 2019). Co-creation processes are often contextualised, suited to the specific conditions present in the firm's value chain and local context (Blowfield, 2012).

Contributions from Castro-Martinez and Jackson (2015), Glauner (2019), McIntosh et al. (2016), Mirvis et al. (2016), Saenz (2019), and Strand and Freeman (2015) argue for engagement as an essential tool to attain SVC, and that adoption of it informs how these engagements should be structured. SVC necessitates heightened engagement with more stakeholders to identify collective social problems (Saenz, 2019). Mirvis et al. (2016) positions the adoption of SVC as an unfamiliar arena for businesses, which needs to be informed by multi-stakeholder engagement. Dembek et al. (2016) identify the lack of multiple stakeholders in engagement processes as a critical shortcoming in SVC. The role of multiple stakeholder engagement in SVC is that it prioritises the creation of added value by seeking to service the interests of a broad group of stakeholders, which enables the exploration of jointness of interests between corporates and local communities (Strand & Freeman, 2015).

The literature reveals a concern for how these engagements are structured. Existing structures of engagement are depicted as disempowering rather than socially embedded and inclusive (Berti & Mulligan, 2016; Blowfield, 2012; Mirvis et al., 2016). For Fernández-Gómez et al. (2020), engagement strategies should be collectively respectful and proactive to be able to create mutual value for communities and firms. Engagement with multiple stakeholders enables the firm to grasp an embedded understanding of the local context and markets. It enables local social relationships to be leveraged, which effectively increases social impact in SVC initiatives (Mirvis et al., 2016). Opportunities for engagement can be stimulated when effective informational flows and transparency are built into the value chain (Saenz, 2019). In Kanter's (2008) study of shared value creation in large firms, she presents technology as an enabler of SVC by promoting interaction opportunities through web-based information sharing.

By expanding decision-making beyond the firm, engaging stakeholders enables expanded value creation through cooperative decision-making (Saenz, 2019). The intention of engagement in SVC is to involve a broad group of stakeholders in the identification of prevalent social issues and social accountability (Strand & Freeman, 2015). Multistakeholder engagement assists the firm in understanding the local context and markets, not only as a tool to achieve SVC but as a leverage for knowledge exchange that increases as firms invest more and facilitate the building of social ties that expand social impact (Blowfield, 2012; Mirvis et al., 2016).

SVC has often been referred to as Corporate Social Innovation, especially in its attempt to reconcile business and social value (Altuna et al., 2015; Elena & Herrera, 2015, 2016; Mirvis et al., 2016; Muthuri et al., 2012; Ramani & Mukherjee, 2013; Saenz, 2019; Sanzo-Perez et al., 2015; Saul, 2010; Tabares, 2021). Lee et al. (2012) unify the relationship between engagement and innovation in SVC in their concept of “co-innovation”, which prioritises co-creation as a vehicle for creating shared value. As a co-creative innovation enabler, SVC proposes that societal impact be the driving force of product and process innovation, both localised and involving diverse stakeholders. Ultimately, challenging the role of business in society as created by existing capitalist frameworks (Grudinschi et al., 2015; Harrison et al., 2010; Hoffecker, 2018; Jager & London, 2019; Lee et al., 2021; Lee et al., 2012; Michelini, 2012).

#### 2.5.6 DISCUSSION OF OVERARCHING THEMES

In concluding the discussion of overarching conceptual and empirical themes, a notable trend has emerged. This is depicted as the contrast between novelty and standardisation. The adoption of shared value creation represents novelty when realised in business model innovation but standardisation when situated within existing sustainability frameworks. This trend of contrast is similarly depicted in the themes of stakeholder engagement and outcomes and indicators. Some authors argued against existing standardised processes of stakeholder engagement, advocating for novel processes to emerge that facilitate SVC. In terms of indicators, some authors proposed the creation of new frameworks and indicators to measure shared value outcomes. In contrast, others argued for standardisation, or that shared value should be measured in alignment with existing performance indicators. This contrast is similarly reflected in the debate around the concept of SVC, which tends to question the novelty of the term in relation to existing, standardised sustainability metrics.

While each suggestion for either novelty or standardisation reveals distinct outcomes, the impact of the narrative remains the same – and that is, the exacerbation of dichotomies rather than promoting shared value as a process through integration. This narrative is problematic, as the dichotomisation of business

and society, economic and social value, and novelty and standardisation are counterintuitive to the creation of shared value. SVC is effectively realised when these dichotomies become dissolved.

## 2.6 DISCUSSION OF THE LITERATURE

The following section presents a discussion of the gaps revealed in the systematic literature review thus far, presents proposals for furthering the concept informed by the extant literature and develops research questions that have emerged to address these gaps.

### 2.6.1 SHARED VALUE CREATION IS MISALIGNED IN PRACTICE WITH ITS CONCEPTUAL INTENSIONS

Conceptually, SVC is described within the context of novelty as a new approach to capitalism, which is no longer relevant or conducive to the contemporary needs of society. Positioned by Porter and Kramer (2011), as a much-needed shift in how business is conducted and the narrative of its relationship to society. However, throughout the literature, it is found to be operationalised and interpreted in alignment with existing conversations of corporate responsibility, sustainability, and distributive value. The conceptual intention of SVC to redefine value, create added value and encourage novel processes of engagement and leadership seem to be reflected in relatively few contributions in the literature. Shared value creation was envisioned by Porter and Kramer (2011), not as an adoption, realised through initiatives, risk mitigation or reputation strategies, but as a new way of doing business, enshrined in values that are embedded throughout a firm. SVC is envisioned through the changing of existing narratives, promoting growth that is inclusive, equitable and empowering for local communities while framed as a strategy that advances the competitive advantage of a firm.

The alignment of social values and corporate objectives seeks to position SVC at the centre of business purpose, where defining unmet social needs serves as the guiding principle of how business is conducted (Alberti & Belfanti, 2019; Bulcke et al., 2020; Driver, 2012; Perkmann et al., 2021; Porter & Kramer, 2011; Saenz, 2019). For Porter and Kramer (2011), social issues have a direct impact on firm profits, and they provide examples of how “poor public education imposes on productivity and remedial-training costs” or how “poor transportation infrastructure drives up the costs of logistics” (Porter & Kramer, 2011: 72). They add that issues of gender or racial discrimination impact the firm directly by reducing “the pool of capable employees”, and that “poverty limits the demand for products and leads to environmental degradation, unhealthy workers and high-security costs” (Porter & Kramer, 2011: 72).

Despite Porter and Kramer’s (2011) strong argument for business investment in social issues, in practice, the adoption of SVC is still largely aligned with the intentions of profit maximisation. This review reveals how SVC has been correlated with financial objectives, often situated within the contexts

of risk and demonstrate an affinity towards measurement through quantitative methodologies (Fernández-Gámez et al., 2020; Font et al., 2016; Park et al., 2014; Saenz, 2019; Serra et al., 2016; Yoon, 2017). Studies that adopted qualitative methodologies or contextualised within emerging economies or low-resourced contexts contrastingly reveal interesting insights into the dynamism of shared value creation as a process (Alberti & Belfanti, 2019; Alcaraz & Hollander, 2019; Azmat et al., 2015; Bulcke et al., 2020; Colovic et al., 2019; Florin & Schmidt, 2011; Spitzeck & Chapman, 2012). This empirical contrast is problematic as it represents that there is a lack of consensus on how the concept is conceptualised, understood, and studied.

### 2.6.2 AUTHENTICITY AND TRUST

The misaligned intentions of SVC also led to issues of public distrust and a lack of authenticity in skewing the concept of mutual benefit (Fernández-Gámez et al., 2020; Moon & Parc, 2019; Yoon, 2017). By misaligning SVC's intended implementation as a core business strategy that seeks to shift existing frameworks of value creation, situate SVC in philanthropic or corporate responsibility initiatives (Azmat et al., 2015; Blowfield, 2012; Jose, 2016; Lankoski & Smith, 2018; McIntosh et al., 2016; Mirvis et al., 2016; Serra et al., 2016; Smorodinskaya et al., 2017; Spitzeck & Chapman, 2012; Voltan et al., 2017).

For instance, Lee et al.'s (2012) presentation of the co-innovation concept mentions how the firm must extend its resources and value creation beyond the organisation to engage with various stakeholders to realise its creation. The criticisms of the SVC literature presented in this review also suggest a misalignment on a more fundamental level – an ontological level. When assigning risk compliance-related intentions to SVC uptake, it overlooks the complexity of the tensions created between balancing economic and social value creation. These approaches seem to embed the organisation very statically in a context distinct from society, whereas SVC proposes a dynamic, iterative understanding of context. These misaligned approaches overlook the relationality embedded in realising shared value creation, which requires relational processes of dialogue.

The literature presents indicators that SVC is more aligned with its conceptual intent when grounded in a process ontology. Suggestions of this are mentioned by both McIntosh et al. (2016) and Strand and Freeman (2015) when they argue for the transcendence of for-profit and non-profit and public and private boundaries. Florin and Schmidt (2011) also referred to how SVC becomes realised when for-profit strategies are shaped with non-profit intentions. In terms of engagement, communities should be redefined as co-creators rather than beneficiaries and corporates as development agents, suggesting that the boundaries between business and society also become ontologically integrated (Blowfield, 2012; Moon & Parc, 2019).

Unsurprisingly, the literature reports hybrid ventures as the optimal business model for creating shared value. Hybrid ventures characteristically consider both local and global resources that combine conventional organisational infrastructure with the building of locally clustered value chains. These business models are structured in for-profit terms but embrace a non-profit ethos. What SVC implies is an integration of individuals, social groups, organisations, and the natural environment in a system where the activities of one organisation impact not only various levels of the organisation itself but other organisations and society more broadly. Although some empirical studies on SVC in emerging economies are present in the literature, along with alternative business models, there remains a gap in exploring its occurrence more broadly in emerging economies or informal business contexts.

### 2.6.3 SUMMARY OF DISCUSSION

In summary, the literature reveals several factors that enable the creation of shared value and that have the potential to enable, constrain, or explicitly constrain opportunities for shared value creation. These factors are summarised in Table 5 below:

*Table 5: Factors that Potentially Constrain or Enable SVC*

<b>Factor</b>	<b>Potential to Enable</b>	<b>Potential to Constrain</b>
<b>Policy</b>	<ul style="list-style-type: none"> <li>• When incentivised by leadership</li> <li>• When incentivised through public policy</li> </ul>	<ul style="list-style-type: none"> <li>• Absence of policy to institutionalise SVC</li> </ul>
<b>Materiality Assessment</b>	<ul style="list-style-type: none"> <li>• When risk mitigation is interpreted to address social needs</li> </ul>	<ul style="list-style-type: none"> <li>• When social strategies of risk mitigation prioritise brand promotion</li> </ul>
<b>Multi-Stakeholder Engagement</b>	<ul style="list-style-type: none"> <li>• To understand context and needs</li> <li>• As a learning exchange</li> </ul>	<ul style="list-style-type: none"> <li>• As a tick-box exercise</li> <li>• When only teaching and unilateral communication prioritised</li> </ul>
<b>Leadership Behaviour</b>	<ul style="list-style-type: none"> <li>• When leadership promotes and institutionalises factors that enable SVC</li> </ul>	<ul style="list-style-type: none"> <li>• When leadership does not create an enabling environment for SVC</li> </ul>
<b>Perception of Value</b>	<ul style="list-style-type: none"> <li>• Value as only shareholder value</li> </ul>	<ul style="list-style-type: none"> <li>• Value as stakeholder value</li> </ul>
<b>Corporate Social Strategy</b>	<ul style="list-style-type: none"> <li>• If needs-driven to competitively address social needs</li> </ul>	<ul style="list-style-type: none"> <li>• If opportunity-driven</li> </ul>

Some factors that have emerged in the literature as SVC enablers include social learning and the leveraging of social ties, the inclusion of emerging enterprises within value chains, and innovative business models. In addition, it has been found that qualitative, in-depth or longitudinal studies help uncover some of these enabling factors. The overarching constraint for shared value creation revealed in the literature were dichotomies and dichotomous narratives, such as private-public, for profit-nonprofit, and business-society, as narratives that reinforce the boundaries between the corporation as

an entity and its social environment.

These issues may be addressed by problematising the existing ontology and reconceptualising SVC in an open-world ontology of process. This may offer a way to reconcile economic and social value tensions. In the conceptualisation of an unbound organisation, SVC has the potential to better serve its novel intent of reconceiving products and markets, redefining productivity in the value chain, and enabling local cluster development.

## 2.7 SOCIAL IMPACT OF AN UNBOUND ORGANISATION

As discussed in the preceding section, reimagining the organisation as unbound presents opportunities to address some of the challenges and tensions revealed in the literature. These tensions are reiterated here, along with inputs from an open-world ontology to propose suggestions seeking to address these challenges. Figure 16 below presents a depiction of the emergent tensions and the proposed processes or transitions that need to occur for SVC to be realised. Two key concepts embedded in the process of ontology enable a redefinition of the organisation, which can facilitate the necessary transitions and ultimately assist in addressing these tensions.

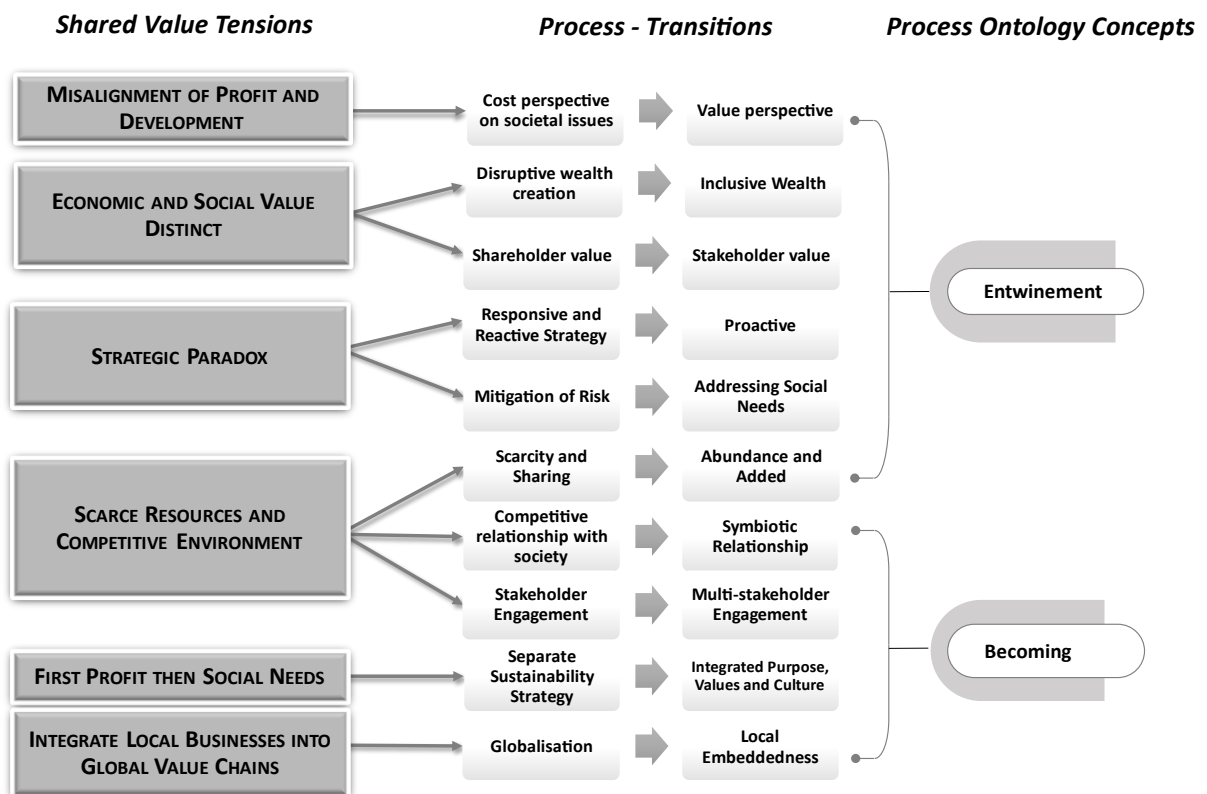


Figure 16: Using a Process Ontology to Address Shared Value Creation Tensions

The process ontological concepts of entwinement and becoming are suggested to mobilise the transitions identified and proposed in the literature.

### 2.7.1 ENTWINEMENT

In the open-world ontology of process, particularly in Karl Weick's (1979) theory of organising, entwinement refers to the interdependent relationship between an organisation and society. The distinct, reified organisation is largely associated with capitalism and bureaucracy, which has proven to be problematic in realising SVC (Otero et al., 1968). Rather than separate from context, organisations are unbound, embedded, and coevolved with the environment (Tsoukas, 2005). Reconceptualising the organisation as entwined imposes an interdependence between social, cultural, political, environmental and economic contexts (Cloutier & Langley, 2016; Langley, 1999; Pettigrew, 1992). It also implicates temporality in this integration, meaning that past, present, and future actions are mutually dependent and entwined with the organisation and environment.

### 2.7.2 COLLECTIVE BECOMING

In the process ontology, the organisation is not considered as distinct and static but in a continuous process of organising in its complex entwinement with context (Hernes, 2007; Weick, 1979; Weick et al., 2005). The context includes human and non-human actors, such as technologies, environments, communities, and individuals (Barad, 2007; Helin et al., 2014; Weick, 1979). Performatively and relationally driven, organising becomes through rather than imposed upon the collective (Weick, 1979). This empowers all organisational agents to guide the formation of what the organisation becomes (Helin et al., 2014; Packendorff et al., 2014; Weick, 1979).

In terms of SVC, this ontology shifts the responsibility of social needs to the collective, of both public and private organisations, as both the cause and resolution to pressing social issues (Blowfield, 2012). This thinking reflects Porter and Kramer's (2011) proposal that capitalism in its current form is no longer sustainable. Reflected also in the sentiments of Dembek et al. (2016), Glauner (2019), Kanter (2008), Lee et al. (2012) and McIntosh et al. (2016), who advocate for new ways of conceptualising the relationship between business and society. An entwined organisation does not distinguish between social and economic value but value as collective. It does not distinguish between shareholders and stakeholders, as all actors within the organisation and society are universally stakeholders to which the organisation is accountable. Similarly, corporate risk becomes fused with social risk, and meeting social needs becomes meeting the needs of the business.

## 2.8 TRANSITIONING FROM SHARED VALUE CREATION TO CREATING SHARED VALUE

Although the terms Shared Value Creation (SVC) and Creating Shared Value (CSV) are used interchangeably in the literature, when reframing the concept within an open-world ontology, and as a process, creating shared value more clearly articulates its processual, continuous nature. Glauner (2019), also addresses the misalignment of the term, in which he proposes creating added value, rather than shared value, to avoid the distributive connotations associated with the term.

The discussion of the conceptual implications above has shown the emergent problems of interpreting shared value creation as a static, dualistic concept, suggesting that the concept be reimagined as a dynamic entwinement of social and economic value. To reconcile the dichotomies of social and economic value, CSV needs to be understood as dialogical, and constitutive of processes of engagement and collaboration (Glauner, 2019; Mion & Beghini, 2020). CSV then, becomes realised as a connection of common human experiences accessible through dialogue, organised continuously (Bakken & Hemes, 2006; Tsoukas, 2017). Failing this ontological articulation underpins CSV within a context of reductionism, dichotomous and philanthropic, rather than strategic. As expressed by Porter and Kramer, (2011), Azmat et al. (2015), and Berti and Mulligan (2016), CSV does not entail a distribution of existing value but requires new sources of value to be sought at the nexus of social and economic needs.

SVC, in its current definition and adoption, is contradictory. The concept is reduced to operational policies and procedures, inferring a static and procedural connotation. But conceptually is defined as the revisioning of products, markets, and value chains, which in practice are dynamic and dialogical (Ajjawi & Higgs, 2007). This contradiction becomes evident in the varied, often dichotomous ways that CSV has been interpreted and empirically studied in the literature. Based on these varied interpretations, it is evident that these contradictions, lead to tensions and inconsistencies that are unable to reconcile theory and practice. Some authors refer to the procedural aspects of the concept, while some argue for a processual conceptualisation, or refer to SVC realised as process.

*Table 6: Comparison of Ontology of CSV in the Literature*

<b>As Procedural/ Entitive</b>	<b>Entitive Critique – Requires Process</b>	<b>As Process</b>
<ul style="list-style-type: none"> <li>• Fernández-Gámez et al., (2020)</li> <li>• Font et al. (2016)</li> <li>• Hatipoglu et al. (2019)</li> <li>• Lankoski &amp; Smith, (2018)</li> <li>• Saenz, (2019)</li> </ul>	<ul style="list-style-type: none"> <li>• Alcaraz &amp; Hollander, (2019)</li> <li>• Blowfield, (2012).</li> <li>• Crane et al., (2014)</li> <li>• Jose, (2016)</li> <li>• Kanter, (2008)</li> <li>• Mcintosh et al., (2016)</li> <li>• Moon &amp; Parc, (2019)</li> <li>• Salo, (2015)</li> </ul>	<ul style="list-style-type: none"> <li>• Azmat et al., (2015)</li> <li>• Berti &amp; Mulligan, (2016)</li> <li>• Bocken et al., (2015)</li> <li>• Bulcke et al., (2020)</li> <li>• Dembek et al., (2016)</li> <li>• Florin &amp; Schmidt, (2011)</li> <li>• Glauner, (2019)</li> <li>• Lee et al., (2012)</li> <li>• Mion &amp; Beghini, (2020)</li> <li>• Porter &amp; Kramer, (2011)</li> <li>• Strand &amp; Freeman, (2015)</li> </ul>

The discourse in the literature provides certain indicators that suggest whether a closed- or open-world ontology to CSV has been adopted. Presented below, are these discursive indicators that represent either closed-world representationalism or open-world relationality. These indicators are not definitive, as you will see below, even though some authors presented relational indicators, they may still have adopted a representationalist epistemology, but they do provide an indication of the author’s epistemological affinity or preference. Therefore, these indicators should be considered as guidelines prior to a more in-depth and critical analysis of the content.

Table 7: Discursive Indicators of Representationalist or Relational Epistemologies

<b>Representationalist Indicators (Entitive)</b>		<b>Relational Indicators (Process)</b>	
<b>Outcome-based, indicator-based, rather than needs-driven.</b>	<ul style="list-style-type: none"> <li>• Hatipoglu et al. (2019)</li> <li>• McIntosh et al. (2016)</li> <li>• Park et al. (2014)</li> <li>• Strand &amp; Freeman (2015)</li> </ul>	<b>Ecosystemic or iterative, rather than linear</b>	<ul style="list-style-type: none"> <li>• Alcaraz &amp; Hollander (2019)</li> <li>• Berti &amp; Mulligan (2016)</li> <li>• Kanter (2008)</li> <li>• Mion &amp; Beghini (2020)</li> <li>• Saenz (2019)</li> </ul>
<b>Risk-focussed</b>	<ul style="list-style-type: none"> <li>• Fernández-Gámez et al. (2020)</li> <li>• Yoon (2017)</li> </ul>	<b>Use of prefixes such as co or re (denoting collaboration and change)</b>	<ul style="list-style-type: none"> <li>• Lee et al. (2012)</li> <li>• Saenz (2019)</li> <li>• Strand &amp; Freeman (2015)</li> </ul>
<b>Quantitative methodologies</b>	<ul style="list-style-type: none"> <li>• Alcaraz &amp; Hollander (2019)</li> <li>• Fernández-Gámez et al. (2020)</li> <li>• Font et al. (2016)</li> </ul>	<b>Hybridity</b>	<ul style="list-style-type: none"> <li>• Azmat et al. (2015)</li> <li>• Berti &amp; Mulligan (2016)</li> <li>• Blowfield (2012)</li> <li>• Florin &amp; Schmidt (2011)</li> <li>• Kanter (2008)</li> </ul>
<b>Sustainability frameworks</b>	<ul style="list-style-type: none"> <li>• Smorodinskaya et al. (2017)</li> <li>• Serra et al. (2016)</li> <li>• Spitzeck &amp; Chapman (2012)</li> <li>• Voltan et al. (2017)</li> <li>• Azmat et al. (2015)</li> <li>• Fernández-Gámez et al. (2020)</li> <li>• Jose (2016)</li> <li>• Lankoski &amp; Smith (2018)</li> <li>• McIntosh et al. (2016)</li> <li>• Mirvis et al. (2016)</li> <li>• Moon &amp; Parc (2019)</li> <li>• Serra et al. (2016)</li> <li>• Spitzeck &amp; Chapman (2012)</li> </ul>	<b>Problematizes existing narratives or perspectives of the role of business in society</b>	<ul style="list-style-type: none"> <li>• Alcaraz &amp; Hollander (2019)</li> <li>• Blowfield (2012)</li> <li>• Fernández-Gámez et al., (2020)</li> <li>• Glauner (2019)</li> <li>• Lankoski &amp; Smith (2018)</li> <li>• McIntosh et al. (2016)</li> <li>• Moon &amp; Parc (2019)</li> <li>• Salo (2015)</li> </ul>
<b>Distinct from purpose, values</b>	<ul style="list-style-type: none"> <li>• Dembek et al. (2016)</li> <li>• Kwon &amp; Park (2019)</li> </ul>	<b>Reference to boundary spanning, dynamic, mutual, dialogue, embeddedness</b>	<ul style="list-style-type: none"> <li>• Berti &amp; Mulligan (2016)</li> <li>• Blowfield (2012)</li> <li>• Bocken et al. (2015)</li> <li>• Bulcke et al. (2020)</li> <li>• Dembek et al. (2016)</li> <li>• Porter &amp; Kramer (2011)</li> <li>• Strand &amp; Freeman (2015)</li> </ul>

## 2.9 CONCLUDING REMARKS AND WAY FORWARD

Within the context of contemporary business, large corporations have embraced the concept of shared value creation as a business purpose. Its authors, Michael Porter and Mark Kramer have mobilised intercontinental communities of practice, which has piqued the interests of industry giants such as Nestlé, Discovery and IBM. This raises the question that if SVC has garnered such mutual interest across diverse actors, how can this interest be advanced towards mutual benefit, and whether this is particularly meaningful to pursue in an emerging economic context.

The objective of this review was to present an overview of how this concept has been conceptualised and studied empirically in the literature. Using the framework of a systematic review, bibliometric and thematic analysis, it has sought to answer this question by critically evaluating the underlying paradigms and narratives of how SVC has been interpreted in the academic conversation. In this analysis, several critical findings have emerged.

Fundamentally, SVC is not a product, but a dynamic process often associated with terms such as synergy, collective action, and mutuality. Its adoption requires a redefinition of value, of the products created and the markets served. It advocates for an understanding of value that extends beyond the confines of an individual organisation to be inclusive of the entire value chain. Yet, several constraints emerge in realising SVC as a process. These constraints appear in the form of dichotomies, which create irreconcilable tensions between social and economic value, society and business, novelty and standardisation and added versus distributive value. These tensions are not confined to businesses and exist in Community-based Organisations such as Football Clubs and Non-Profits. The literature reveals the only organisational structures that have managed to have an embedded understanding of SVC are hybrid business models such as social enterprises. But not every business can be a social entrepreneur, so how can these insights be reconciled with the realities of corporates?

The literature provides valuable insights into overcoming these challenges. Firstly, stakeholder engagement emerges as a guiding principle in navigating the complexities between social and economic value by inspiring innovative insights into new value streams. Building close relationships with local communities emerges as another strategy to provide mutual benefit to both producers and consumers. Other enablers of SVC include harnessing co-creation, adopting needs-informed approaches, innovative and adaptive business models and being effectively driven by people who believe in its purpose, both at the leadership and employee levels. Interestingly, intrapreneurship is both an enabler and an outcome of SVC investment.

As revealed in this review, novel insights emerge when SVC is studied in minority contexts such as

emerging economies or low-resourced environments. These contexts relocate SVC from large corporates revealing the potential of changing narratives on dominant business contexts. These findings converge as several gaps in the literature, which raises the following sub-questions:

- If shared value creation is conceptually misaligned and as argued in this review more fruitfully serves its intention when redefined in the open-world ontology of process...

*How can shared value be reimagined from an open-world ontology of process?*

- If empirical studies on shared value creation are largely quantitative and studied within the context of large corporations, and the few studies that have adopted qualitative methodologies in low-resource contexts reveal nuggets of relationality...

*How does a qualitative study, guided by a relational ontology, illuminate the dynamics of shared value creation within low-resourced contexts, considering the prominence of quantitative methodologies on large corporations in the existing literature?*

- In seeking to study the becoming of shared value creation not only will the process that drives how organisations organise around shared value be revealed, but understanding how organisations internalise their externalities.

*How is the information that the environment is providing being registered by organisations, and how are these surrounding social issues interpreted, internalised, and infused into the organisation?*

- To understand how shared value creation emerges, a way forward could be to understand or determine whether creating shared value becomes the ontological desire of a collective, and whether this is leader-driven...

*How do collective organisations converge through partnership to create shared value beyond organisational boundaries?*

Ultimately, it is intended that these sub questions will converge to test the theoretical, contextual and empirical validity of shared value creation aimed at addressing the main research question of whether SVC is a meaningful pursuit in the content of an emerging economy.

The Chapter that follows is aimed at answering the first sub question in seeking to critically redefine shared value creation as a processual phenomenon and develop a framework that could inform an empirical study of the process of creating shared value.

# CHAPTER 3: TOWARDS AN ETHICO-ONTO-EPISTEMOLOGY OF PROCESS-PRAXEOLOGY – FROM PROCESS TO PRACTICE TO AGENCY

*“Think left and think right and think low and think high. Oh, the thinks you can think up if only you try”*

Dr Seuss

## 3.1 INTRODUCTION

In the quest to critically redefine shared value creation as a processual phenomenon, it is necessary to begin with unpacking the foundation of process theory within the context of organisation studies. In the last decade, the field of organisation studies has displayed a growing interest in using philosophical inquiry as a meta-theoretical device to question the construct of organisational phenomena (Emmet, 1966; Olsen, 2011; Jehenson, 1984; Martela, 2015; Mir et al., 2016; Nayak & Chia, 2011; Tsoukas & Chia, 2011). I have interpreted this trend, as indicative of organisational scholars’ response to Tsoukas and Chia’s (2011) call for critical organisational scholarship that recognises the partiality of conventional constructs, viewpoints and knowing. A sentiment echoed by Cloutier and Langley (2016), in their discontent expressed with the dominant paradigm of positivism in organisation studies.

Whilst there has been advances in philosophical inquiry to reconceptualise the organisation as process (Weick, 1979), as lived and living organisms (Dewey, 1938;1986) or as deconstruction (Derrida in Tsoukas & Chia, 2011), I propose an onto-epistemology emergent from Dewey for the study of organisational phenomena from the perspective of those who live it (Helin et al., 2014; Hernes, 2007; Tsoukas & Chia, 2011; Weick, 1979). As contextual and processual, I situate lived experience as the site of inquiry into organising phenomena, as I endeavour to contribute to an expansion of viewpoints and knowing for critical organisational scholarship (Armour et al., 2009; Cloutier & Langley, 2016).

I begin this quest with Karl Weick’s (1979) process theoretical understanding of organisations as organising. This raised questions of practice for me in not being able to reconcile this view with an empirical study in practice, which led me to pragmatism. I use pragmatism to ground this theory in practice, which led to the expansion of interaction to transaction as the site of inquiry (Dewey, 1938; Simpson, 2009; Tsoukas & Chia, 2011). With Dewey’s insights, it became evident that the lived experience was inseparable from this transactional inquiry, which opened the possibility of studying organisational phenomena in varied, unconventional forms and contexts, a gap revealed in the literature review.

As a scholar in an emerging economy context, three areas of concern inspired this meta-theoretical quest. The first was the role of the corporate organisation in society, the second was the practical applicability of mainstream organisational research in my context, and the third was the representation of contextual knowledge in diverse organisational forms and contexts. These concerns arose from the literature but were shaped by critical reflection on my context. Upon reflection, I contemplated whether corporates that were considered distinct from society assume social accountability and what the potential implications this could have for not only environmental but social sustainability. In an emerging economic context such as South Africa, where high levels of inequality exist, could this not have adverse consequences on social cohesion? Upon further reflection on living in a context with a thriving micro-business and informal sector, I questioned how these dynamic sectors became excluded from the conversation of shared value creation.

Process philosophy satisfied my first concern, altering my understanding of the organisation from entity to a dynamic, continuously becoming, convergence with society, but fell short of addressing my remaining concerns (Langley et al., 2013; Rescher, 2000; Weick, 1979). A reading of philosophical contributions to organisation studies Czarniawska (2008), Farjoun et al. (2015), Helin et al. (2014), Olsen (2011), and Tsoukas and Chia (2011) introduced me to pragmatism, in particular, the works of John Dewey (1938a, 1988) on education and experience, as a pathway to potentially address my concerns related to context. However, what remained to be reconciled was how and why certain contexts became excluded. This is what led me to the work of quantum physicist Karen Barad, who introduced me to agential realism, essentially infusing ethical responsibility.

This was the final piece of my philosophical quest, which led me to position this chapter with ethico-onto-epistemological intent. Ontological in the sense of a reality inspired by process and pragmatist philosophy, epistemological in how lived experience as a site of inquiry shapes and is shaped by this reality in formulating how I come to know, and ethical in the sense that as a scholar, I am accountable for scaffolding the boundaries and narratives I help to reinforce or dismantle. However, what I argue in this chapter is that dualisms constrain rather than expand our knowledge. Therefore, I position ontology, epistemology and ethics as inseparable and intra-acting, as “practices of knowing in being” (Barad, 2007: 185).

I envisage that these contributions would advance the field in terms of critical organisational scholarship, as well as Tsoukas and Chia’s (2011) proposition of openness to knowing. In the sense of Barad (2007), this ongoing performance, in the expansion of viewpoints that contribute to existing conversations on philosophy in organisation studies in general and pragmatism in organisation studies more specifically (Allee, 2009; Cohen, 2007; Czarniawska, 2008; Farjoun et al., 2015; S. Kelley & Nahser, 2014; Locke, 2012; Mion & Beghini, 2020; Powell & Baker, 2017; Saenz, 2019; Simpson,

2009; Simpson & den Hond, 2022; Tsoukas & Chia, 2011; Wicks & Freeman, 1998).

Being grounded in an “open-world” ontology, this chapter begins with an overview of how understanding the world as unbound helps one better understand organisations as complex and dynamic (Tsoukas, 2005: 5; Weick, 1979). I then present some of the potential limitations of this ontology, particularly as it has been developed by Weick (1979) and argue that an experiential epistemology grounded in Dewey’s pragmatism and Barad’s (2007) agential realism can help overcome some of these limitations (Cloutier & Langley, 2016; Langley, 1999; Tsoukas, 2005).

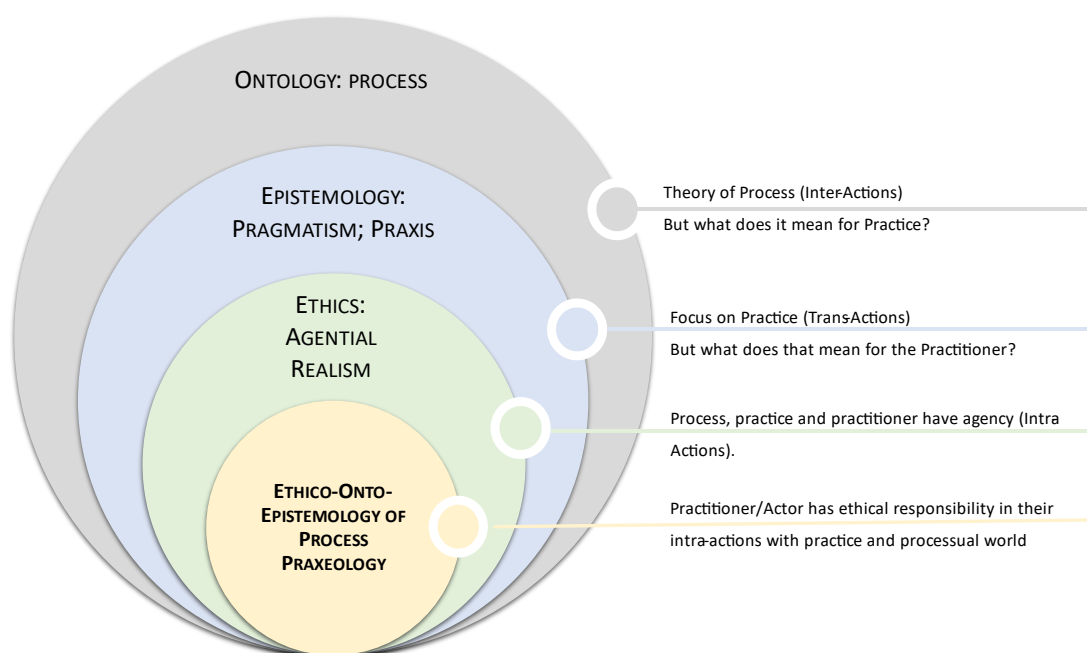


Figure 17: Theoretical Framework Overview

What emerges is an open-world, ethical onto-epistemology, in which knowing emerges from the lived experience as an intra-active ongoing performance, an entwinement of intellect, action, reflection and embodiment (Barad, 2007; Gill, 2014; Sandberg & Dall’Alba, 2009; Tsoukas, 2005; Weick, 1979). These developments intend to be metatheoretical, using epistemology for philosophical inquiry. They lay the foundation to conceptually and methodologically inform an empirical study of shared value creation, how it emerges and becomes through lived experience, and how this may contribute to an openness of knowing (Acampado, 2019; Dewey, 1988; Shotter, 2016; Tsoukas, 2005). The section that follows begins this quest into the philosophical foundations of process.

### 3.2 THE OPEN-WORLD ONTOLOGY OF PROCESS

“One cannot step twice into the same river”. That is how the philosopher Heraclitus described the nature of the world in which we live (Helin et al., 2014; Langley et al., 2013; Nayak & Chia, 2011). The essence of process, as new waters flow, the river changes, and as we change in every instant, so is the experience of stepping into the river a second time different from the first. As such, the world is fluid, so too are our experiences of it. We change as we interact with a world that changes. Its very nature effects change upon us. A world that is static and compartmentalised is one that is antonymous with the open-world ontology of process (Langley & Tsoukas, 2016; Tsoukas, 2005). A closed world exists outside of our experience of it, a separation that allows it to be observed and objectively studied (Barad, 2007). The basis of the closed-world ontology, as distinct from the context within which it exists, is a paradigm that traditionally dominates the world of scientific research (Thompson, 2011).

The field of organisation studies is no exception. A few authors worth mentioning have adopted an open-world ontology of process in the study of organisations and organisational phenomena, Nigam et al. (2022) and Van De Ven and Poole (2005) use process philosophy in their study of organisational change, Weber and Glynn (2006) in their criticism of Karl Weick’s sensemaking for its absence of institutional contextualisation, de Rond and Bouchikhi (2004) in their dialectical study of inter-organisational collaboration, Willmott (1993) in problematising the subjectivist and objectivist duality in organisation studies, Bakken and Hernes (2006) in their conceptual contribution to Weick’s sensemaking using the work of Whitehead, and, Holt and Johnsen’s (2019) consideration of temporality as a key construct in process studies of organisations. The establishment of the Process Organisation Studies Symposium (PROS)<sup>3</sup>, now in its 14th year, with its related publication, *Perspectives on Process Organisation Studies*, indicates the emergence of a growing interest in the field. However, the remaining dominant paradigm tends to conceptualise the organisation as a closed-world entity, abstracting it from its immediate, local and broader context rather than as entwined with society (Tsoukas & Chia, 2011). These decontextualised, abstracted, close-world ontologies imposed by the scientific rationale produce studies that are often quantitative in nature, aimed at generating grand, generalisable theories. These studies have been criticised for having low practitioner value due to their abstraction from context (Tsoukas, 2017).

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<sup>3</sup> PROS is an annual event organised in conjunction with the annual series of *Perspectives on Process Organisation Studies*, published by Oxford University Press. The event takes place on a Greek Island in June every year. Information sourced from the PROS website <https://osofficer.wixsite.com/pros> accessed 10 February 2023.

As the dominant paradigm of academia, scientific rationality limits the inclusion of localised knowledge and context. When a study involves human actors, especially a collective of human actors, as in the field of organisation studies, this paradigmatic affinity could become desensitised to the complex human experience. The duality imposed by scientific rationality, which boundaries and labels distinct categories, positions the human at the centre of the universe rather than as “a part of the nature we seek to understand” (Barad, 2007: 26). Whether consciously or subconsciously, deliberately or unintentionally, this duality imposes ranks, assigning one category as more important than the next (Barad, 2007, 2014). In this ranked duality, one collective entity becomes the norm, and the other becomes othered (Barad, 2007).

In contrast, the practical rationality embedded in the open-world ontology of process views the social world as a constellation of processes in which permanence is an illusion and everything in the world is in constant flux (Langley et al., 2013; Tsoukas, 2005). Central to this ontology are human agents, who individually or collectively construct and create processes through action (Pettigrew, 1992). An open-world ontology of process prioritises processes over states, such as the process of becoming over the state of being or the process of organising over the state of organisation (Tsoukas, 2005; Weick, 1979). Karl Weick (1979), in his seminal work, *The Social Psychology of Organising*, can largely be attributed to bringing the open ontology of process to the field of organisation studies, in which his concepts of sensemaking and double interacts, informed the relational nature of organising. What follows is a conceptualisation of organisation as process, undergirded by Karl Weick’s contribution and what that means for the study of organisational phenomena.

### 3.2.1 FROM ORGANISATION TO ORGANISING

The firm, as a constituent of this open-world ontology of process, becomes re-envisioned as a coevolving, unbound organism, a dynamic bundle of qualities centred on mutually beneficial objectives, where everything is a “matter of process, activity, or change” (Langley et al., 2013: 5; Tsoukas, 2005). Viewing the organisation as constantly becoming or in a process of organising conceptualises how reality is brought into being in every instant, constituted and reconstituted over time through social practices (Langley et al., 2013). Performatively and relationally driven, Weick’s organisation becomes through collective desire (Weick, 1979). A socially situated desire that occurs at the individual and collective level that guides the formation of what we perceive as organisation (Helin et al., 2014; Packendorff et al., 2014; Weick, 1979).

Organising is antonymous to the reified organisation of capitalism and bureaucracy, embracing abstraction, evolution and fluidity (Otero et al., 1968). Organising is personified as constituted by living agents who act upon it, interact and whom it acts upon (Tsoukas, 2017). This personification is evident

in the discourse of sustainability, where organisations are often referred to as good corporate citizens, responsible contributors to society, engaging in sustainable practices, embedded in culture, possessing values, and responsible intent for the environment and society. Personifying the organisation and conceptualising it as always *becoming*, reinforces the way it is studied with temporal consideration (Cloutier & Langley, 2016; Langley, 1999; Pettigrew, 1992). In that, past, present, and future actions are intertwined with social, cultural, political, environmental and economic conditions.

Weick (1979) refers to organising as situated within a complex, entwined dynamic context that more closely resembles the nature of the world in which we live (Sandberg & Tsoukas, 2011). The value of adopting a process ontology for the study of organisations that positions the researcher within the processes they study (Barad, 2007; Hulst et al., 2016). Perceiving ourselves (as researchers) in the open-world ontology of process, as situated in context and “part of the nature we seek to understand”, entwines us with phenomena (as the fundamental units of reality in the Baradian sense) that are constituted by multiple human and non-human actors, thereby expanding the scope and impact of the research (Barad, 2007: 26; Weick, 1979). The researcher adopting a process ontology acknowledges how their presence and interactions act on the organisational processes they study and how these processes act upon them. When situated within process rather than outside it, knowledge creation is illuminated to better understand the complexities of this phenomenal reality (Barad, 2007; Hernes, 2007; Tsoukas, 2005).

Using the open-world ontology of process helps one account for infinite organising potentialities, where what we see as the abstracted organisation is only one of many possible outcomes (Helin et al., 2014; Hernes, 2007; Weick, 1979). The existence of infinite potentialities is why organising is not static but rather a continuous, dynamic process. An organisation becomes through its various entwinements with human and non-human actors, such as technologies, environments, communities as well and individuals, and there are always multiple potentialities that could result from each of these encounters (Barad, 2007; Helin et al., 2014; Weick, 1979). The concept of potentialities has temporal implications, as mentioned earlier, as a fundamental attribute of process; what I observe as conduct co-produced in the present is shaped by earlier conduct and, in turn, reshapes potentialities for future conduct (Helin et al., 2014). The open-world ontology of organisation as process, entwined with Weick’s contribution of becoming and entwinement, situates context as an output rather than an input of organising (Tsoukas, 2005; Weick, 1979). As such, the process of organising influences the environment as much as the environment influences it, but what does this mean for the study of organisational phenomena?

### 3.2.2 THE STUDY OF ORGANISING PHENOMENA

Chia (1999) and Chia and King (1998) argue that the open-world ontology of process should be the dominant paradigm in organisation studies, as it opens opportunities for researchers to study how organisational phenomena unfold over time (Barad, 2007; Czarniawska, 2008; Hernes, 2007). By giving primacy to process, organising phenomena are reintegrated into an entwined context that more closely resembles the world within which we exist (Czarniawska, 2008; Hernes, 2007; Tsoukas, 2017; Weick, 1979). This affords researchers an opportunity to generate knowledge that seeks to resolve real-world problems on a theoretical and practical level. These problems are not perceived as occurring in isolation; processually, they are accumulative and intersectional, requiring novel, qualitative methodologies to study how organisations and society converge (Barad, 2007; Tsoukas, 2005).

By understanding the building blocks of process, I can begin to unpack how to adopt an epistemology informed by the open-world ontology of process (Burrell & Morgan, 1979; Tsoukas, 2005). This “enactivist”, performative or relational epistemology situates knowledge as embedded in action (Blomqvist & Levy, 2006; Carton, 2020; Hernes, 2007; Hultin, 2019; Poole et al., 2016; Tsoukas, 2005: 6, 2011, 2019; Tsoukas & Knudsen, 2003; Weick, 1979). There are two approaches to adopting the enactivist epistemology, as discussed in Weick’s (1979) work, the first approach being rooted in discourse. The use and study of discourse is central to Weick’s thesis, where he describes process discursively as the connections between nouns and verbs. For Weick (1979), these are relational words that depict time and indicate movement through time, motion, change and flow. Both Pentland and Rueter (1994) and Weick (1979) refer to organising as a “grammar” and “grammars of action”, respectively, as metaphors for describing the rules or recipes that influence behaviour in organisations (Pentland & Rueter, 1994; Reed et al., 2006; Weick, 1979: 3).

The second approach in adopting an enactivist epistemology is rooted in behaviour, in which Weick describes the “raw materials” of process as interlocked behaviours (Weick, 1979: 47). These “raw materials” or units of analysis constitute individual behaviours, interlocked between two or more actors, in what Weick (1979) refers to as “interacts”, or “double interacts” when these behaviours are dependent and recurring. Therefore, in studying organisational phenomena through behaviour, I can begin to observe individual and connected behaviours, along with the grammar that influences these behaviours.

Whether rooted in discourse or behaviour, enactivist epistemologies prioritise action and interaction as the connections between words or behaviours (Hernes, 2007; Langley & Tsoukas, 2016; Weick, 1979). When viewed retrospectively, action helps clarify what an organisation has done (Weick, 1979: 245). Actions and practices are relational in the enactivist epistemology, in which the self becomes in relation to others (Dionysios & Tsoukas, 2013: 187). This complex integration of self and other, as collectively

comprising organising, aids in understanding entwined organising phenomena, such as identity, change and value. Adopting the enactivist epistemology, then, situates knowledge in what Nayak et al. (2019) refer to as the “micro foundational substrates” of organising by uncovering how individual or collective discourse, actions or practices continuously co-create and co-constitute the phenomena of organising (Argote & Ren, 2012; Bendig et al., 2018; Fallon-Byrne & Harney, 2017; Howaldt et al., 2013; Langley et al., 2013; Nayak et al., 2019; Teece, 2018).

Beyond the scope of the microfoundational substrates of interacts are events, that encompass the onset of these interactions (Weick, 1979). These events, which could include a decision, meeting or conversation, act as stimuli by initiating a response of sensemaking to environmental ambiguity or equivocality in Weickian terms. Organising phenomena can then be studied through the sequence of events leading up to its emergence by observing the evolving sensemaking actions and interactions of organisational actors or by studying their cognitions and emotions as they interpret and respond to these events (Weick, 1979). The temporal characteristic of an open-world ontology of process emerges in these enactivist processes of sensemaking, where actors are trying to make future or present decisions based on actions taken in response to historical events (Rescher, 2000).

The temporal consideration of process enables an intellectual and intuitive articulation of how different actors, through sensemaking, attempt to predict future consequences of probable actions, enabling rich, contextual insight into organising phenomena (Nicolini, 2011). As actors ‘make sense of’ the perceived equivocality in the entwined environment, actions arise that collectively enable this potentiality of organising to emerge, the potentiality under current observation (Hernes, 2007). A potentiality temporally frozen would be an abstraction of organising, as new potentialities continuously emerge with the changing enactments of collective sensemaking (Helin et al., 2014; Hernes, 2007; Weick, 1979; Weick et al., 2005). To make sense of the world, of data, of enacted environments, that is, to remove equivocality is the reason for any organisation’s existence (Weick, 1979). Therefore, the process of sensemaking is the process through which organising occurs (Weick, 1979; Weick et al., 2005).

In a disordered reality, with disordered agents, the ordered state of organisation can never be actualised. As individual and collective agents act to remove equivocality through sensemaking in pursuit of perceived order attainment, a new potentiality of organisation emerges. As the pursuit of order is infinite, so too are the emergent potentialities of organising (Helin et al., 2014; Otero et al., 1968; Weick, 1979; Weick et al., 2005). Therefore, if organisations and organisational agents were to view their current condition as a potentiality of sensemaking, it could stimulate action towards new organising realities (Hernes, 2007; Morlacchi, 2021; Otero et al., 1968; Saenz, 2019; Weick, 1979). Despite the ambitious intent of the open-world ontology of process and its ensuing enactivist, performative and relational epistemology, it is not without limitations. The next section presents an overview, reflecting

on these limitations and a means to potentially overcome these limitations by introducing the philosophy of pragmatism. The next section aims to advance the ontological and epistemological aspirations of the process with pragmatism.

### 3.3 REFLECTIONS ON THE ONTO-EPISTEMOLOGICAL LIMITATIONS OF ORGANISING

#### 3.3.1 REFLECTION IN SENSEMAKING

The first reflection concerns the sensemaking process of organising. For Weick (1979), organising emerges through processes of sensemaking. Sensemaking is understood as the ongoing retrospective process through which human agents give meaning to their actions and experiences (Weick, 1979; Weick et al., 2005). Weick (1979) describes sensemaking as a solitary and social process, comprising individual and collective experiences. Through sensemaking, meanings of plausibility and improbability emerge and are assigned to actions retrospectively (Weick, 1979; Weick et al., 2005). As such, sensemaking is the “primary site where meanings materialise that inform and constrain identity and action” (Weick et al., 2005: 409). Interpretation of action is the central focus of sensemaking, which Weick et al. (2005) position as the core phenomenon in organising experience.

The nature of sensemaking is reflective since meanings emerge in the interpretation of the collective experience of retrospective action (Langley & Tsoukas, 2016; Sandberg & Tsoukas, 2011, 2020; Weick, 1979). Herein lies the first limitation. Sensemaking situates organising in the past, meaning that what is being studied is what has already been organised, which is contradictory to the theory of organising as a continuous emergence. The shortcoming of reflection is that it only pays attention to pre-existent social variables rather than emergent (Barad, 2007; Barla, 2021; Dunk, 2020). The interpretation, then, of the collective experience becomes based on the interaction between retrospective action and pre-existent social variables. Consequently, the sensemaking reflection includes only the past experience and is isolated from the present experience. This aspect of sensemaking lacks predictive capabilities, which translates to low practitioner value. Reflexive practices take for granted the idea that such interpretations reflect the social and natural reality. As Barad (2007) argues, it is often assumed that the representations produced by reflexive practices have no effect on the objects, actions or interactions being interpreted (Barad, 2007: 87). As a result, reflection reproduces the determinant boundary between the world and our experience of it, which is contradictory to the open-world ontology of process (Barad, 2014; Barla, 2021; Thompson, 2011; Tsoukas, 2005). Reflection, therefore, reproduces the representationalism of the closed-world ontology, which separates us from the world in retrospect (Barad, 2007).

### 3.3.1.1 Temporal Considerations and the Centrality of Discourse

Another limitation is reflected<sup>4</sup> in the centrality of discourse and temporality in sensemaking. Weick (1979; 2005) positions the articulation of organisational sensemaking as “embodied in written and spoken texts” (Weick et al., 2005: 409). For Weick et al. (2005), “situations, organisations and environments are” spoken into existence (p. 409). A distinction noted by Barad (2007) in reference to Foucault is the difference between discourse and discursive practices. Whereas discourse refers to “speech acts or linguistic statements”, discursive practices “are the material conditions that define what counts” these acts or statements as meaningful (Barad, 2007: 63). This distinction is not clear in Weick’s (1979; 2005) reference to discourse in sensemaking, where even though he refers to discourse linguistically, he assigns to it the meaning-making role of discursive practices. Consequently, what fails to be considered are the boundary-producing capabilities of discursive practices (Barad, 2007). Through discursive practices, some parts of the world become determined or made meaningful by another part of the world, while the rest becomes a reconfiguration of potentiality (Barad, 2007). Discursive practices then, rather than discourse, more accurately describe the meaning-making processes central to organisational sensemaking.

The temporal consideration of sensemaking accounts for the entwinement of the historical and the perspective in the collective interpretation of decision-making events (Rescher, 2000; Weick, 1979; Weick et al., 2005). A *reflection* is that this consideration of temporality is limited by abstracting time from space and matter. “Space, time and matter are mutually constituted through the dynamics” of interactive sensemaking, where properties of space and matter emerge with time (Barad, 2007: 181). In this ongoing becoming, matter carries within itself the temporality of historical practices through which it is produced and re-produced in the collective space of organising (Barad, 2007: 180).

### 3.3.1.2 Epistemological Shortcomings of Open-World Organising

Contrasting the epistemological consequences of an open-world and closed-world ontology more generally is another useful point of departure for articulating the limitations of organising. Table 8 provides a summary of the epistemological attributes of these opposing ontologies.

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<sup>4</sup> The term reflection is italicised to indicate the caution and due consideration of its use in this chapter, as informed by Barad (2007).

Table 8: *Contrasting Epistemological Attributes of Closed- and Open-World Ontologies*

<b>Closed-World Ontology</b>	<b>Open-World Ontology</b>
Representational Epistemology	Enactivist/Performative/Relational Epistemology
Reality is static & complete	Reality is dynamic & ongoing
Pattern-identification and generalisability of findings	Deep contextualisation, lacks predictability
Distant from Data	Closeness to Data
Identification of causal relationships	Identification of process pathways
Solidifies Dichotomy, emphasis on distinct entities	Dissolves Dichotomy, emphasis on interaction
Distinction between Observer and World to be Observed, Subject & Object	Observer as part of the world sought to be observed, Subject and object entwined
Single representation of reality & units of analysis	Multiple potentialities of reality & units of analyses

Source: Author's own

The characteristic of the closed-world ontology is an epistemology grounded in representationalism in that knowledge of the world is produced as a single, objective representation of a static and complete world. Representationalism is realised through a distinct separation between the research subject and the object under investigation. The scientific rationality of representationalism seeks to identify knowledge patterns and causal relationships to produce predictive and generalisable explanations of organisational phenomena at the cost of overlooking the nuances of rich, qualitative data (Langley, 1999).

Contrastingly, the enactivist epistemology of an open-world ontology produces knowledge that is deeply contextualised as one articulation of the multiple potentialities that could be articulated in a complex, dynamic world, constantly in the process of becoming (Tsoukas, 2005). Enabled to produce rich understandings of organisational context and patterns in events, the practical rationality of an enactivist epistemology sacrifices the identification of knowledge patterns, prediction and parsimony (Cloutier & Langley, 2016; Sandberg & Tsoukas, 2020). Knowing in an open-world ontology is infinite, and phenomena are emergent, based on the ongoing interaction between an inseparable subject and environment. The researcher becomes part of the world, they seek to understand and, therefore integrate into the processes of organising. Despite high accuracy, based on its closeness to data, it is unable to explain outcomes easily explained by relationships of causality (Cloutier & Langley, 2016). Instead, adopting an enactivist epistemology can only attribute outcomes as potential pathways of process (McEvily et al., 2003).

### *3.3.1.3 The Limited Potentialities of Compromised Dualisms*

A contradiction in the enactivist epistemology of organising is depicted above in its preoccupation with dichotomising a closed- and open-world ontology. Potentiality is limited by this preoccupation, which discredits the organising objective of dichotomy dissolution (Helin et al., 2014; Weick, 1979). Another contradiction lies in the separation of epistemology from ontology, which reverberates rather than dissolves dichotomy and limits potentiality by creating a distinction between knowing, being and doing. This disregards the inseparability of ontology, epistemology, and action (Barad, 2007: 318).

Weick (1979) positions human agents as central to the enactivist, relational epistemology of organising, who individually or collectively construct and create processes through action and interaction (Pettigrew, 1992; Tsoukas, 2005; Weick, 1979). Not only does this position humans at the centre of the universe, but limits potentiality by excluding interactions with non-human agents. Barad (2007) argues for the inclusion of non-human agents in this open-world ontology, who collectively and continuously co-construct reality with human agents (Tsoukas, 2005). The world and human agents in the world are unbounded and dynamic, but so, too, are the apparatuses that human agents use to explain the world (Barad, 2007; Holford, 2018; Langley & Tsoukas, 2016; Ratner, 2020). Reality, as the reconfiguration of spacetime and phenomena, continuously becomes through the collective interaction between the world and human and non-human agents (Barad, 2007, 2014). Phenomena are the fundamental units that constitute this reality, ontologically inseparable from these various agents and their co-emergent existence (Barad, 2007, 2014).

When Weick (1979) describes sensemaking, he refers to it as both a solitary and social process, constituted by individual and collective experiences, a complex integration of self and other. But he seems to prioritise sensemaking's social, collective aspect in his organising model (Hernes, 2007; Langley & Tsoukas, 2016; Weick, 1979; Weick et al., 2005). Organising becomes through collective desire, through a socially situated interpretation of collective experience (Helin et al., 2014; Packendorff et al., 2014; Weick, 1979; Weick et al., 2005). Consequently, in prioritising the collective, the individual becomes understated. The individual lived experience is a narrative of inquiry that encompasses temporality, cognition, and social agency. Through inquiry into the lived experience, we gain insight into the individual interpretation and understanding of how abstract or historical concepts become manifested in the social world (Cloutier & Langley, 2016; Shotter, 2016b). The solitary sensemaking process is, therefore, an abundant source of multiple meaning-makings. Understating the individual understates this abundant source of the lived meaning-making experience and, consequently, limits the potentiality of an organising model that equally prioritises the individual and collective experience (Cloutier & Langley, 2016). Interpreting the collective and individual actions in sensemaking, in

addition to exploring the meaning of action and interaction from multiple individual actor experiences, expands the dimensions of potentiality through which organising occurs. Adding this element of meaning and human experience creates emergent opportunities to explore cognitive phenomena such as intuition and creativity (Mesle & Dibben, 2020; Nayak et al., 2019; Nicolini, 2011).

*Reflecting* on the onto-epistemological limitations of organising, I conclude that my contribution has to serve the dissolution of dualisms by problematising reflection and reflexive practices as apparatuses of sensemaking. Moreover, my contribution should aim to redefine discourse as discursive practices as cognisant of its boundary-producing capabilities, reconstitute reality as inclusive of space, time and matter, human and non-human agents and prioritise the lived experience of individuals in organising processes. In the next section, I present the philosophy of pragmatism inspired by the work of John Dewey, with some inputs from Barad's (2007) diffractive methodology to suggest a means to potentially overcome some of these limitations. To advance the open-world ontology of process, I propose an onto-epistemological perspective that contributes to the study of organising phenomena.

### 3.4 ADVANCING PROCESS WITH PRAGMATISM FOR THE STUDY OF ORGANISING PHENOMENA

The value of adopting an open-world ontology of process for the study of organising phenomena is that it is more closely aligned with the dynamism of the world I seek to understand (Ferraro et al., 2015; Tsoukas, 2019; Tsoukas & Chia, 2011). Organisations and their integrated, interactive components are always evolving, and so too are interpretations and understanding thereof (Weick, 1979). To view organisations as continuously becoming, I am empowered to transcend the static abstractions of representationalism. However, the nature of organisation studies and social sciences more generally, in its study of individual and collective human agents, presupposes an intention to inform the practices of these organisational and social agents. Dissolving the dichotomies between theory and practice, academics and society through an open-world ontology of process enables scholars to contribute to knowledge that upholds the practical intent of organisation studies. The constraints that limit scholars to do so have been reflected above. By adopting the philosophy of pragmatism as a complimentary enabler of process, I begin to reimagine organisational studies as a praxeology.

#### 3.4.1 REIMAGINING ORGANISATION STUDIES AS PRAXEOLOGY

Tsoukas and Chia (2011), provide a useful distinction between ontology, epistemology, and praxeology, where they contemplate ontology to be concerned with the “general structure of reality” that epistemology is concerned with the formulation and justification of knowledge claims and that “praxeology deals with how knowledge is related to action, and more specifically, how theory is related

to practice” (pg. 12). This distinction is useful in articulating the various components of organising phenomena but are essentially inseparable in an open-world. Barad (2007) refers to this inseparability of being, knowing and doing in her book titled, *Meeting the Universe Halfway: Quantum Physics and the Entanglement of Matter and Meaning*.

Reimagining organisational studies as praxeology is an attempt to reconnect knowledge with action and being is aimed at dissolving the dichotomy between theory and practice. By searching for meaning at the onto-epistemological nexus of praxis, I can begin to reposition the research project as a reciprocal, emerging embodied process between ourselves and the subjects under study (Cassell et al., 2018). Praxis not only refers to thoughtful action but also includes the relationship between this action and the socio-organisational context within which this action occurs (Johnson et al., 2017; van Manen, 2014). Otero et al. (1968) refer to praxis as the conception of human beings as creative, productive makers and shapers of their own history and experience (pg. 5). Praxis represents the unification of being, knowing and doing. As inclusive of holistic human action, praxis grounds each experience of the dialectical, relational being (Pomeroy, 2004; Warde, 2004). In Freire’s (1921) *Pedagogy of the Oppressed*, he refers to this dialectical relationship as the only means to unveil authentic praxis (Freire, 2005: 51, Original 1921, English translation 2005). In contrast to the objectification of representationalism, praxis restores the “self-determined freedom” to the subject, prioritising praxical relations as a site of inquiry (Pomeroy, 2004: 18, emphasis added).

Reimagining organisational studies as praxeology requires a shift of inquiry from interactional sensemaking to transactional, praxical relations directed at solving problems in the real world (Geerts & Carstens, 2019; Helin et al., 2014). Embracing this shift, the organisation moves away from the process of organising and becomes reimagined as a lived and living organism (Feenberg & Lukacs, 2014). Beyond Weick’s (1979) enactment, focussing on praxis helps translate the entwined organisation and environment to the universal language of action, meaning and experience (Acampado, 2019; Dewey, 1938a; Tsoukas & Chia, 2011). A shift to praxeology shifts the response to equivocality from sensemaking to inquiry (Tsoukas & Chia, 2011). Rather than aiming to interpret collective experience, praxeological inquiry is focused on creating knowledge and revealing new actions. Thus, knowledge is attributable to the outcome of the inquiry. By transforming interpretation into knowledge creation, organisational studies can produce outcomes that are more closely aligned to the practitioner experience and attain the praxeological aspiration of unifying theory and practice. Reimagining organisational studies of process as praxeology requires meta-theoretical insight into the philosophy of pragmatism as the philosophy of praxis. Grounded in praxical relations of inquiry, pragmatism offers valuable insights to not only address the limitations of organising but advance organising to be inclusive of praxis (Geerts & Carstens, 2019). Seeking to unify dichotomy, pragmatist philosophy situates phenomena in the becoming of human experience, a collective of meaning and action. Directed at solving problems in the

real world, what follows is an introduction to pragmatist philosophy and how these insights could open new opportunities in the field of process organisation studies (Barla, 2021; Geerts & Carstens, 2019; Simpson & den Hond, 2022).

### 3.4.2 AN INTRODUCTION TO PRAGMATISM

Pragmatism, the philosophy of praxis, was said to have originated in the 1870s with the formation of the Metaphysical Club (de Waal, 2022; Tsoukas, 2005). A group of young individuals from Cambridge, including the likes of William James and Charles Sanders Pierce, congregated to philosophise about the practical value of doing philosophy (de Waal, 2022; Joas, 1993; Roberts, 2001; Tsoukas & Chia, 2011). The historical context that led to the emergence of pragmatism was one characterised by the social reform movements of women's suffrage, the abolition of slavery in the United States, the second industrial revolution, as well as religious reformation and scientific revolution such as Charles Darwin's evolutionary theory, and the inventions of the light bulb and telephone (Mulhall, 2015; Tsoukas & Chia, 2011). Evidently, the decade between the 1870s to the 1880s was a period when dualisms of gender, class, and race, and between science and religion were exacerbated. One of the intentions of the philosophy of pragmatism was a means to transcend these dualisms (Tsoukas & Chia, 2011).

De waal (2022), quotes Papini's 1907, What Pragmatism is Like, in there being no precise definition of pragmatism. Instead, he argues, that one can only specify its main character, which is that:

*“pragmatism “unstiffens” our theories and beliefs by recognizing their purely instrumental value, making them susceptible to change when the circumstances alter”*

(de Waal, 2022: 90).

Hence, he states, that “pragmatism does not stand for a certain type of theory, but for a certain attitude towards theories” (de Waal, 2022: 90). This statement is actualized in my reading of the pragmatist texts of John Dewey (1916, 1920, 1922, 1929a, 1929b, 1934, 1938b, 1938a; Dewey & Bentley, 1949) and interpretations of pragmatism reflected in Cohen (2007), de Waal (2022), Farjoun et al. (2015), Ferraro et al. (2015), Hargraves (2019), Heinich (2020), Heinonen and Strandvik (2022), Joas (1993), Popa et al. (2015), Putnam and Putnam (2017), Roberts (2001), Simpson and den Hond (2022), Tywoniak et al. (2021), and Wicks and Freeman (1998), where pragmatism is characterised by its commitment to process and practice. Pragmatism prioritises knowing as a continuous process and as an outcome of inquiry in response to real-world problems (Farjoun et al., 2015).

As a problem-solving philosophy, pragmatism situates social and organisational problems at the centre of its understanding of human action, particularly the entwinement of human action and meaning, and

its embeddedness in “emotion, with contextual and social life” (Farjoun et al., 2015: 1789; Heinonen & Strandvik, 2022: 468). Pragmatism can be viewed as an approach that rejects the closed-world ontology of positivism (de Waal, 2022). It challenges this reductionist model of positivist scientific rationality and its consequential dualisms between “the *production* and *use* of knowledge” (Popa et al., 2015: 48, emphasis added). Like process, pragmatism strongly distrusts dualism, prioritising process, temporality, events and relations without neglecting structures and entities (Farjoun et al., 2015: 1788). Although pragmatists generally commit to a process ontology, they do not assume a strong “everything is process” view (Langley et al., 2013; Tsoukas, 2005). Rather, the pragmatist observes the interdependency of structure and process while approaching knowledge production within a “community of inquiry” that materialises in the engagement with everyday problems and “practicalities of living in an uncertain ever-changing world” (Langley et al., 2013; Popa et al., 2015: 47; Simpson & den Hond, 2022: 28; Wicks & Freeman, 1998).

With a view of reality as lived in and inclusive of the whole individual, pragmatism is a style of thinking which substantiates transformation through action, on serving human purposes, thus highlighting “the moral dimensions of organisations and the need for research to have practical value” (de Waal, 2022; Simpson & den Hond, 2022; Wicks & Freeman, 1998: 123). To transcend the dualisms of research as theory or practice, of problems as either moral or social or political, of inquiry or experience as individual or collective, and between means and ends, is to embrace the philosophical tradition of pragmatism (de Waal, 2022; Ferraro et al., 2015; Nayak & Chia, 2011; Putnam & Putnam, 2017; Vaara & Whittington, 2012). Embracing pragmatism or taking pragmatism seriously, as expressed by the Putnam’s (2017), is to:

*“take oneself to be living in a world that one shares with others, others with whom one cooperates in inquiry, others with whom one may compete for scarce resources or with whom one may cooperate in seeking to achieve common goals. It is to see oneself not as a spectator but as an agent in the world. And that means that one often confronts the question, “What is to be done?”*” (Putnam & Putnam, 2017: 17)

Taking pragmatism seriously means understanding how social selves and social situations are intricately entwined (Cloutier & Langley, 2016; Sandberg & Tsoukas, 2011, 2020). This process of being that is continuous and inseparable from others and our environment exemplifies the pragmatic principles of continuity and entwinement and their active union with each other (Dewey, 1934, 1938a; Sandberg & Tsoukas, 2020). Being, or the living experience, are active, social processes, articulated in the active participles of becoming, knowing and organising (Beaton et al., 2021; Dewey, 1938a; Dewey & Bentley, 1949; Hernes, 2007; Langley et al., 2013; Nayak & Chia, 2011; Sandberg & Tsoukas, 2020; Simpson & den Hond, 2022; Weick, 1979; Weick et al., 2005).

To take pragmatism seriously requires a movement beyond the limitations of dualisms. As the shift in inquiry takes place towards outcomes of knowing, sourced in the active, living experience, we are empowered with infinite potentialities to address real-world problems (Dewey & Bentley, 1949; Mir et al., 2016; Tsoukas, 2017; Weick, 1979; Willmott, 1993). To explore these potentialities, I draw from the writings of John Dewey, particularly his theory of experimentalism in its prioritisation of experience (Dewey, 1934, 1938a; Dewey & Bentley, 1949).

### 3.4.3 PRIORITISING EXPERIENCE WITH DEWEY'S EXPERIMENTALISM

John Dewey, an American philosopher and educator, is recognised for his intellectual contributions to the philosophy of pragmatism. Primarily focused on the field of education, Dewey (1938) believed in the unity of theory and practice. He assimilated education and learning to growth, arguing that practice alone was insufficient to specify growth's direction. Growth may take many different directions, and Dewey (1938) uses the example of a criminal to illustrate this point.

*A criminal, through practicing crime may grow in the direction of being highly expert in crime. But, when growth is assimilated into education and learning, the direction of growth has moral and intellectual implications, where the question becomes whether growth in a particular "direction promotes or retards growth in general", whether a particular "form of growth creates conditions for further growth or whether it creates conditions" that exclude the person from opportunities for growing in new directions "*

(Dewey, 1938a: 36).

For the practice of growth to be realised, it must be directed by the moral and intellectual considerations of the practice. For Dewey, the integration of practice, intellect and morality in his conceptualisation of growth was materialised in the lived experience (Dewey, 1938a; Dewey & Bentley, 1949). In Dewey's theory of experimentalism, he conceptualised experience as the experimental activities of organisms as they adapt to and within their environments (Ferraro et al., 2015) The way Dewey defines experience is as the interaction between the individual and their environment and how it adjusts for lived experience to be expressed in reality.

Dewey's theory fuses practices arising from empirical situations and those of academic pursuits by situating experience at the nexus where continuity, temporality, and reason (ideas and concepts) entwine (Ferraro et al., 2015). For Dewey, it is only when embodying a concept through experience, experienced through action, that one is fully able to articulate the life of a concept as lived. This embodied lived experience encompasses temporality, reflection, and social agency as a narrative in which I can begin

to articulate how abstract concepts or ideas become manifested in the social world (Shotter, 2016a). It is the continuity of lived experience that links the past and the future through the actions of the present. Applying Dewey's experimentalism to organisational life would enable us to understand how and why organisational paradigms shift, or new paradigms become adopted, on an individual, collective and practitioner level (de Waal, 2022). Understanding a concept theoretically and intellectually remains abstract if absent of experience. Experimentalism brings substance to the abstraction, as situated in practice and immersed in context (Langley et al., 2013).

As a researcher applying Dewey's theory of experimentalism, when asking the respondents to reflect on their lived experience, I probe for their experimental activities. These are activities that have led to change and emergence from change in the environment. This probing is a practice of inquiry, which is practised through action; therefore, in studying action, I find the source of inquiry (Tsoukas & Chia, 2011). It is an action that gives inquiry into life and how learning creates cognisance of the world and our place within it. Experience, for Dewey, encompasses both action and inquiry. Using Dewey's theory of experimentalism to advance an open ontology of process guides the organisational scholar to not only study the action that underpins a practice but also draws our attention to the agent who acts, the agent, and in Dewey's case, the human agent, and their lived experience. Inquiry into the lived experience, thus, allows the researcher to pinpoint the exact actions that have collectively informed the agents' understanding of particular ideas and concepts, which has invaluable implications for how action is organised and informed by concepts (Cloutier & Langley, 2016; Dewey, 1922, 1938a; Tsoukas & Chia, 2011). Lived experience then, as a collective of action and interaction, becomes the site of inquiry as opposed to a singular firm or process when inspired by Dewey's experimentalism (Dewey, 1938a; Tsoukas & Chia, 2011).

Dewey refers to communities of practice as an embodiment of a shared living experience in which the unscripted knowledge of shared accounts becomes accessible, as experienced by multiple actors (Helin et al., 2014). Communities of practice enable the research to begin understanding how knowledge becomes tacit and shared. By revisioning interactions as collective lived experiences of communities of practice, moves away from the idea of interactions being constituted by static linkages between two distinct entities, towards an understanding of relational constituents that continuously shape and are shaped by agents (Weick, 1979). Communities of practice as deliberative and relational, validate knowledge "through an iterative and adaptive process" rather than prescribing to predefined criteria, as characterised by the scientific rationale (Popa et al., 2015: 47). Instead, these deliberative processes intersect theoretical concepts with practical experimentation through social learning and the confrontation of different reasoned perspectives" Studying communities of practice through experience, as premised in Dewey's experimentalism, envisions reflexivity as an open-ended process of inquiry "geared towards...social innovation and experimentation" (Popa et al., 2015: 48). By entwining

experience with the experience of practitioners, the cocreation of actionable, knowledge becomes activated (Popa et al., 2015: 47).

Using Dewey's experimentalism to advance the open ontology of process reconceptualises the organisation as a lived or living organism. The organisation, therefore, interacts with its environment in the same way as the human agent, in that they are not defined by only one interaction but a collective of interactions. Similarly, the organisation embarks on a process of organising through a collective of enactments. How the individual and the organisation decide to interpret these enactments determines their composition. Therefore, according to Dewey, if the human agent cannot be selective of its enactment, only the interpretation thereof, then the organisation, as a collective of lived experiences, can only comprehend organising through its collective interpretation of organising phenomena. For Dewey, this relationship between agent and environment is articulated as not only interactional, as an effect, but transactional in that this effect amounts to an exchange. The next section provides a deeper inquiry into Dewey's notion of transaction and how this concept, along with Barad's intra-action, can be used to advance the concept of interaction ascribed to the open ontology of process.

#### 3.4.4 FROM WEICK'S INTERACTION TO DEWEY'S TRANSACTION

Interaction is to the open-world ontology of process, what transaction is to the pragmatist philosophy. Both ontological and epistemological dispositions perceive that organisations are constituted by evolving agents as individuals and collectives and their evolving relationships with each other. Both ontological paradigms situate processes for understanding phenomena in the emergence and formation of these relationships. Where process and pragmatism differ, however, is in their intended outcomes of these processes. For process theorists, who ascribe to Weick's organising model, the intended outcome of these relationships is sensemaking. For pragmatists, who ascribe to Dewey's experimentalism, the intended outcome of these relationships is knowledge. Another distinguishing factor is how process theory and pragmatist philosophy frame the nature of the relationships between agents and their environment or context. For process theorists, the nature of these relationships is interactive, whereas pragmatists describe the nature of the relationships between agents and environments as transactive.

Below is a graphical representation of the four phases of Weick's organising model to illustrate the interactive nature of the relationships between human agents and their environment.

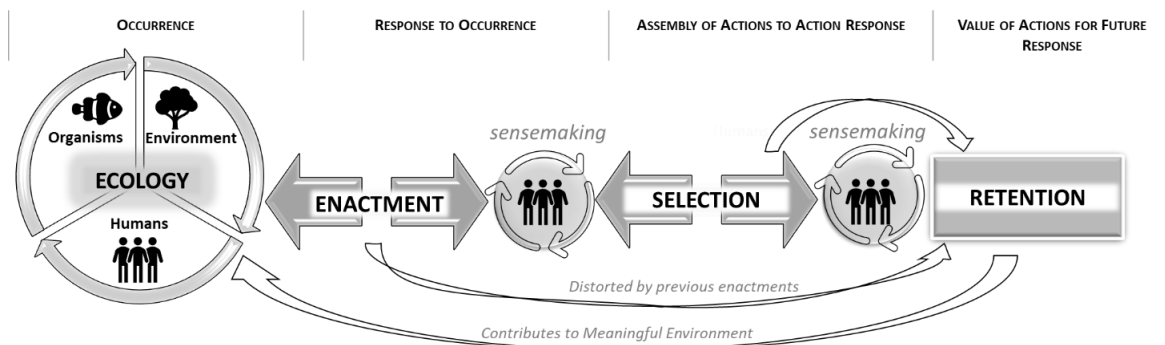


Figure 18: Representation of Weick's Organising Model. Source: Author's Own

In Weick's (1979) organising model, there are several occurrences when interactions take place. In the first instance, Weick (1979) uses the term ecology to represent the interaction between organisms, the environment and human agents. An ecological change stimulates interaction between the environment and the collective of organised human agents. Interactions then take place among and between the collective in iterative processes of sensemaking in order to select the best plans of action to respond to the collective comprehension of the ecological change. Through the interactive process of dialogue and deliberation, only plans of action are retained that are determined as valuable for future enactments.

Weick's (1979) model uses interaction to demonstrate the connections between various human actors and their environment. He refers to dialogue and dialogical processes as interactions between the collective interpretations of experience and as the connections, words, and behaviours (Weick, 1979). What pragmatists argue is that the nature of interaction presumes the existence of predetermined entities (Dewey, 1929a, 1938a; Dewey & Bentley, 1949; Wicks & Freeman, 1998). Meaning that entities need to pre-exist for the interaction between them to be realised. Enactment, for instance, distinguishes between human agents and their environment in reference to their interaction. Not only have pragmatists argued that interaction presumes pre-existing entities, but that the characteristics of these entities are also presumed (Dewey, 1929a, 1938a; Dewey & Bentley, 1949).

A segment of Weick's (1979) organising model can be abstracted to illustrate the progression from interaction to transaction.

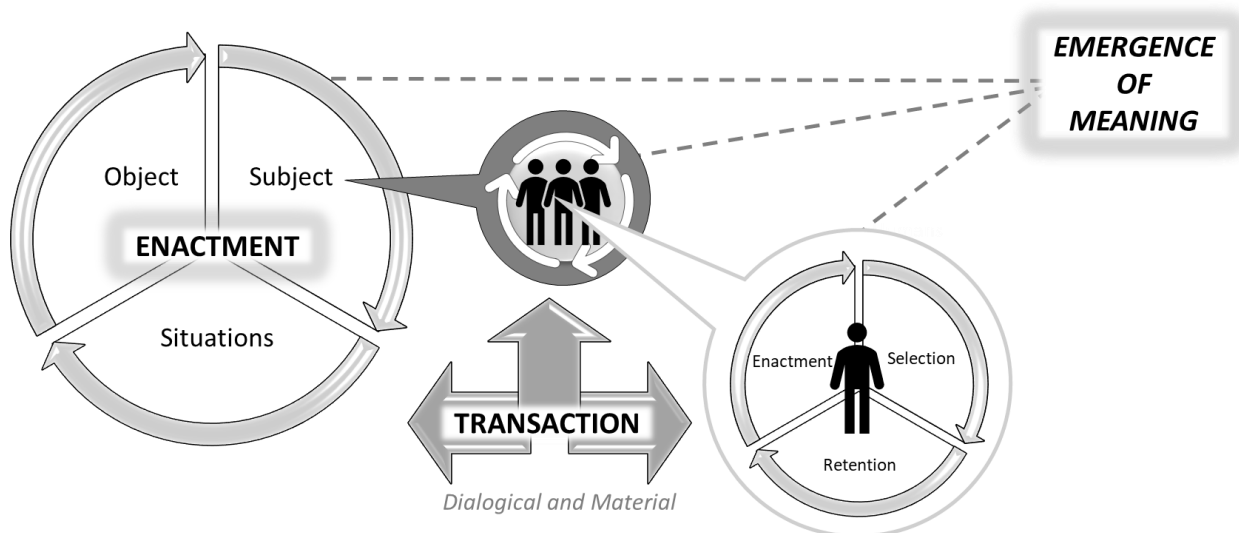


Figure 19: Graphical Representation of Organising as Transaction Source: Author's Own

As depicted in Figure 19 above, the transactional approach draws together subjects (individuals), objects (knowledge) and situations into a “mutually constituting dynamic whole” (Helin et al., 2014: 72). The concept of transaction adds the dimension of materiality to the process of enactment. In a transaction, an interaction occurs between the individual and the environment in which there may be dialogical and material exchange (Hulst et al., 2016; Tsoukas & Chia, 2011). The material exchange could be tangible or intangible, such as exchanging money for a product or exchanging knowledge. Either way, there is something material that each actor leaves the transaction with that they did not have before the transaction occurred. The currency of exchange in a transaction is what motivates the transaction to occur repeatedly since the transaction is based on mutually beneficial principles. Thus, the relationship between the individual and the environment is not dualist or interactional but transactional, where reality is not constituted as a social system comprised of various macro and micro levels but as the dynamic transactional interplay between individuals, organisation and environment (Helin et al., 2014). The transaction extends Weick’s (1979) model of organising from the collective to the individual level, where organisational becomes not only through a collective process but that this collective process is constituted by individuals who are embedded in their own processes of becoming.

Transaction moves beyond the existence of predetermined entities by arguing that existence only becomes realised through the transaction. The transaction is what assigns meaning to each actor in the exchange. Even individuals’ characteristics are transactional rather than predetermined and emerge as outcomes of transactions with other actors (Farjoun et al., 2015). In the transactional perspective, objects are not to be understood to have predetermined attributes that pre-exist in their observation nor as if only existing in intellect by being observed. Instead, in the transaction, an object, along with other objects, exists as it stands, as observation that is unframed and all-inclusive, as opposed to the abstracted scope evident in scientific observation (de Waal, 2022).

Dewey distinguishes between three levels of organising and inquiry, which are all human behaviours with respect to the world. These include self-action, inter-action and trans-action. He describes self-action as an action that occurs when entities are viewed as acting under their own powers. Inter-action occurs when actions between entities are balanced against each other in causal interconnection, and trans-action occurs when systems of descriptions and naming are used to deal with aspects of action and where action is not attributed to nor ignorant of presumptive entities and the relations between them (Dewey & Bentley, 1949: 133). If one were to adopt the transactional view as an unfragmented organism-environment, it would mean adopting knowing rather than sensemaking as the process through which organising occurs (de Waal, 2022; Dewey & Bentley, 1949; Weick, 1979; Weick et al., 2005). In this unfragmented organism-environment, knowings themselves arise and exist prior to being known (Dewey & Bentley, 1949). Following Dewey, knowing is a mutual, open and flexible process entwined with communication, where knowing and the known constitute one transaction (Dewey & Bentley, 1949). No instance of either is observable without the other. For Dewey (1938; 1949), the processes of knowing are social processes of mutual entanglement with others and the world in which the known is constructed (Dewey, 1929a, 1938a; Dewey & Bentley, 1949; Simpson, 2009). Any claim made to be known should be made on the basis of an event, in which inquiry is itself an event (Dewey & Bentley, 1949: 136).

### 3.5 COMPLIMENTING DEWEY'S TRANS-ACTION WITH BARAD'S INTRA-ACTION

Much of what Dewey depicts in his concept of trans-action is reflected in Barad's (2007), intra-action. The approach I propose is complimentary, expanding only certain aspects with Barad (2007) towards a deeper consideration of the relationality between subjects, (material) objects, and situations. Barad (2007) enhances pragmatist thinking by adding a dimension of agency to the construction of reality, which has ethical implications on the processes of knowing and meaning.

#### 3.5.1 INTRODUCING AN AGENTIAL DIMENSION TO A TRANS-ACTIONAL REALITY

Dewey and Barad both ascribe to a performative, relational account of the world in their actional perspectives, where they offer an alternative to representationalism by shifting the intention of inquiry from causal explanation to "matters of practices, doings and actions" (Barad, 2007; Cohen, 2007: 135). They insist that knowing, inclusive of thinking, observing and theorising, are practices of engagement with the world, inseparable from our being-in-the-world (Barad, 2007; Barla, 2021; Dewey, 1988; Dewey & Bentley, 1949; Tsoukas, 2017). Barad adopts Dewey's contribution of materiality to Weick's interactional model of organising, but she reframes material and discursive transactions as tools with agential properties. For Barad (2007), material-discursive practices are the tools used to study the world.

In studying the world, we disturb materiality through our material-discursive practices by enacting dualistic boundaries that enable some parts of the world to become determined by another part of the world. Barad ascribes agency not only to the world and human actors but also to the tools that human actors use to explain the world in these processes of determination.

In essence, Dewey’s trans-actional reality is a mutually constitutive dynamic whole of subjects, objects and situations that emerges from the transactions between these constituents. In contrast, Barad conceptualises reality as the reconfiguration of spacetime and phenomena that emerge from the intra-action between human and nonhuman agents and the world (Figure 20). In Dewey’s theory, subjects, objects, and situations are actualised, and their characteristics are actualised in trans-actional exchanges, which are situated temporally as one of many potentialities. For Barad, subjects, objects, situations, and the cytoplasmic ‘matter’ that connects them are actualised through their intra-actions, which are not situated in spacetime but mutually create spacetime itself (Barad, 2007). Therefore, the material is not only produced through trans-action but is agential, in the sense that it is” produced and productive, generated, and generative” (Barad, 2007: 137). She moves away from the concept of temporality towards spacetime as emergent intra-phenomena. For Barad, agency is not an attribute but “the ongoing reconfigurations of the world”, which she refers to as agential realism (Barad, 2007: 141).

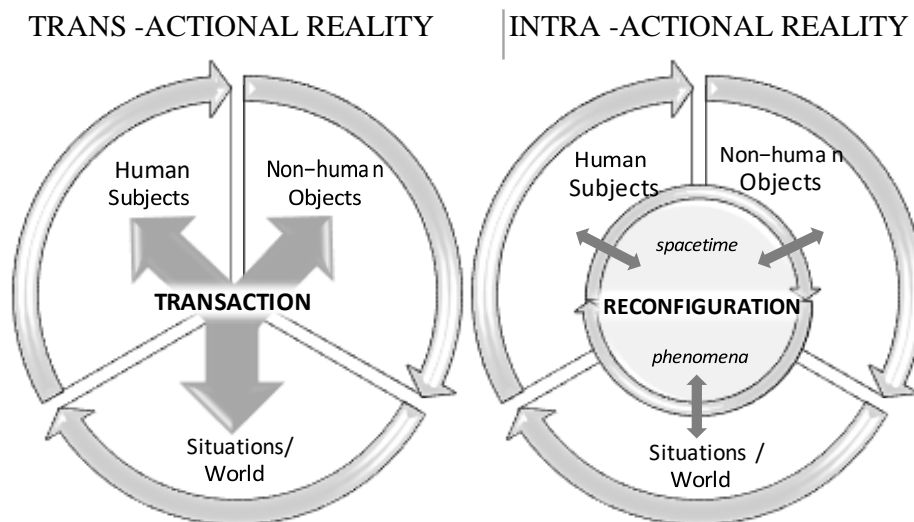


Figure 20: Comparison of Trans-Actional and Intra-Actional Reality. Source: Author's Own

In agential realism, the processes of knowing are material practices that take place within and as part of the world. Through practicing knowing, we not only engage with reality but also alter it.

### 3.5.2 KNOWING AND MEANING AS INTRA-ACTIVE

Just as Dewey attributes knowing and the existence of entities to be realised from trans-action, Barad (2007) attributes the knowing, the existence and the abstraction of entities to be realised from discursive practices, “material conditions that define” whether “acts or statements” are meaningful (Barad, 2007: 63). In addition to the process of knowing and the existence of the known, Barad adds a dimension of the unknown. While some parts (knowing) of the world become determined by another part (known), the remaining parts (unknown) become a reconfiguration of potentiality. In Barad’s model of agential realism, she does not attribute this determination only to human actors. For Barad, determination is a characteristic of the world or matter’s becoming. Meaning and knowing in agential realism is an ongoing performance of matter in its “differential dance” of knowing, known and unknown (Barad, 2007: 149). Because reality becomes through intra-action, Barad argues that we cannot distinguish between Dewey’s knowing and known as these emerge simultaneously (Dewey & Bentley, 1949). Since spacetime, matter and meaning co-emerge at every intra-action, we are unable to distinguish between emergences as existing, newly created or renewed (Barad, 2007).

Dewey situates the human actor at the centre of known and knowing phenomena (Dewey & Bentley, 1949). Barad agrees but enfoldes an ethical dimension for the human actor. Situating being within processes of knowing requires an awareness of what parts of the world we permit to be revealed or remain hidden in our study of phenomena. It is, therefore, our responsibility as human-centred actors in the processes of knowing that we are accountable for our revelations and the consequences of what we do not reveal. We ourselves are accountable to the boundaries created that privilege certain matterings or revelations above others (Barad, 2007).

Barad articulates this ethical dimension in framing her theory of agential realism as ethico-onto-epistemological. In our practices of knowing, we are accountable for the boundaries, properties, and meanings we assign to the world. “Our intra-actions contribute to the differential mattering of the world” and we are responsible for the differences we enact (Barad, 2007: 178).

The inter-active, trans-active and intra-active views are distinctive in the ways they epistemologically situate phenomena as ‘events’ to be known. Weick’s organising model situates understanding phenomena in studying the sensemaking actions and interactions of actors. Dewey’s experimental pragmatism situates phenomena in the becoming of human experience as a collective of meaning and action. Barad’s agential realism situates phenomena at the intra-action of ontologically inseparable agencies to be understood through material-discursive practices. Selecting the situation of phenomena is the foremost stage to deciding how the phenomena will be studied.

I appreciate Barad's contribution to ethics in redefining research scientists as responsible contributors to knowledge. A responsibility that expands the contribution to context in the conscious determination of which differences or dualism become selected to be diminished or exacerbated. Inspired by Dewey's experimentalism and Barad's agential realism, I propose an open-world ontology of process that promotes a critical rethinking of organisational phenomena in their relationality. What conditions are being created and recreated that enable or diminish representationalism? What are the conditions that I recreate to advance a relational or performative view of organisational phenomena?

### 3.6 TOWARDS AN ETHICO-ONTO-EPISTEMOLOGY OF PROCESS-PRAXEOLOGY

Thus far, in my effort to reimagine organisation studies as praxeology, I have addressed the potential limitations of an open-world ontology of process with reference to Weick's theory of organising, using insights from Dewey's pragmatist philosophy. I have argued for the entwinement of knowledge, action and being and for inquiry to be focussed on outcomes of knowledge that seek to address real-world problems. I have also contemplated that ethics are imbued in the processes of inquiry and knowing and that as a scholar, I have a responsibility to be conscious of the boundaries and attributes I impose mattering and un-mattering upon. I position myself as a process organisation scholar who is responsible for intra-actors. An excerpt from Barad (2007) describes this position:

*“Intra-acting responsibly as part of the world means taking account of the entangled phenomena that are intrinsic to the world's vitality and being responsive to the possibilities that might help us, and it flourishes...it is an ethical call...to take responsibility for the role that we play in the world's differential becoming”* (Barad, 2007: 396).

I articulate my position as the ethico-onto-epistemology of process praxeology. A proposal grounded in the open ontology of process that prioritises knowledge in practices and actions as I endeavour in inquiry and knowing while considering the ethical implications invested in these processes. The ethico-onto-epistemology of process praxeology is an appreciation of the entwinement of ethics, knowing, and being realised in our intra-action, and the ontological inseparability of doing, knowing and being (Barad, 2007).

Process Praxeology is inspired by the contributions of pragmatism and agential realism to encompass the various dimensions for the study of organisational phenomena as dynamically entwined intra-actions. Process-Praxeology infers the study of praxis as reflective, meaningful action in a processual world (Freire, 2005; Hardy, 1999). My use of this compounded term expands praxis to include material-discursive practices and reimagines praxis with transformative potential as intra- active action not only upon but within a processual world (Barad, 2007; Dewey, 1929a, 1938a).

To investigate praxis requires an investigation of intra-actors' comprehension of their lived reality and their action upon and within it, which Freire (2005) asserts is most suited to a co-creative, reflective methodology. Therefore, process-praxeology situates the knowing of organisational phenomena in the lived and living experience of organisational actors contextualised within a lived and living organisation as a way of knowing the world from within and as a part (Barad, 2007; Dewey, 1929a, 1938a; Dewey & Bentley, 1949). In this world, praxis, agents of praxis (both human and non-human), and the world itself are continuously and iteratively entangled and constituted. Praxis, praxis agents, and the world have become and are becoming through their intra-action. "In order to be, we must become" (ing). In order to know, we must be knowing (Freire, 2005: 84). This 'we' is not reserved for praxis agents but the agency of the world and praxis itself (Barad, 2007).

The intention of process-praxeology is to contribute to ethically invested knowing and known outcomes derived from ethically-driven inquiry (Barad, 2007; Dewey, 1938; Dewey & Bentley, 1949). As a scholar informed by this ethico-onto-epistemology, I have responsively shifted my inquiry to the experiencers of the phenomena I seek to know while remaining conscious of the broader contextual intra-actions from which these experiences have emerged as a means to contribute to outcomes that have practical, real-world resonance. As a process-praxeologist, I embark on knowing organising phenomena through the lived and living experience of human agents located in an intra-active context while remaining accountable to the boundaries and attributes my knowing processes enable or constrain Figure 21.

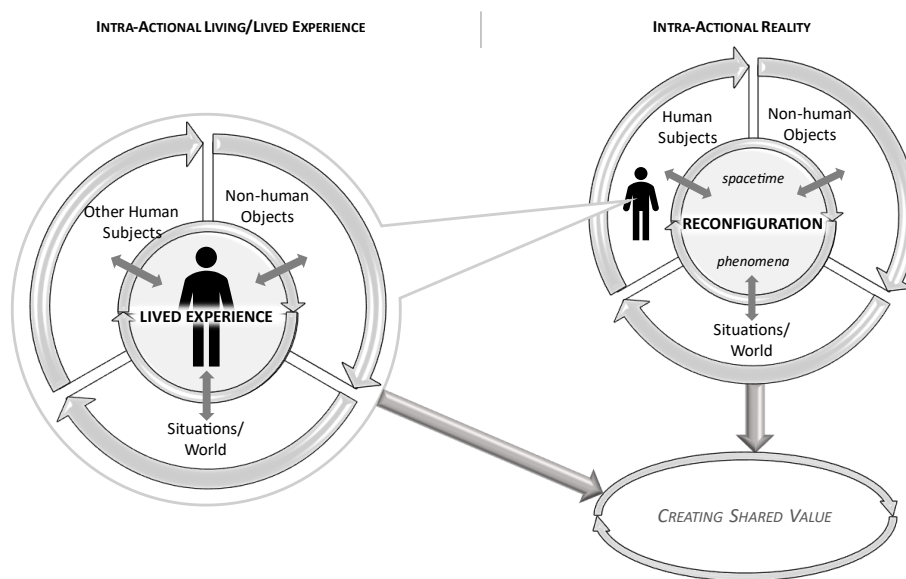


Figure 21: Study of Organising Phenomena in Process-Praxeology

### 3.7 METHODOLOGICAL IMPLICATIONS OF PROCESS-PRAXEOLOGY

In reimagining organisation studies praxeology and responding to Tsoukas and Chia's (2011) call for critical organisational scholarship, the ethico-onto-epistemology of process-praxeology has been proposed. Following this ethico-onto-epistemological framing of organising phenomena as within and as part of an intra-active reality, the methodological implications of this framing will now be considered. To consider methodology is to engage in a consideration of how to contribute to knowing organising phenomena through empirical data. Process-praxeology has methodological implications in situating the knowing of organising phenomena in the lived and living experience of human agents.

#### 3.7.1 PHENOMENOLOGICALLY-INSPIRED PROCESS-PRAXEOLOGY

Phenomenological methodologies complement process-praxeology by situating the site of inquiry in the lived and living experience of human agents (Sanders, 1982). Phenomenological approaches articulate the lived and living experience as beingness in the world, transcendent of subject-object dichotomies (Sanders, 1982). As a process-praxeologist, I articulate the lived and living experience as the entanglement of beingness, knowingness and doingness in a transcendent subject-object-situation trichotomy. In phenomenological approaches, there is a presumption that experience cannot be abstracted from the world, since experience, as it is lived is entangled (Moran, 2000; Sandberg & Dall'Alba, 2009; Sanders, 1982). This presumption resonates with process-praxeology's contemplation of experience as within and as part of an inclusive, intra-active whole (Barad, 2007).

A phenomenological approach to studying organising phenomena offers insight into the lived experience of real-world problems (Ferraro et al., 2015; Gill, 2014; Tsoukas & Chia, 2011). Phenomenological approaches enable process-praxeologists to understand organising as an ever-changing intra-action of meanings and actions (Barad, 2007; Dewey & Bentley, 1949; Hernes, 2007; Tsoukas & Chia, 2011; Weick, 1979). Husserl's (1970) conceptualisation of the life-world foregrounds the lived experience in the study of organisational phenomena. Husserl first used the term life-world in his 1936 *Crisis of European Sciences and Transcendental Phenomenology*, in which he referred to the life-world as "the general ground of human world-life" (Carr, 1970: 157). With reference to Figure 22, the life-world, as Husserl (1970) describes, would encase the lived experience in the intra-active collective of other human subjects, non-human objects, and situations, as depicted in the figure below.

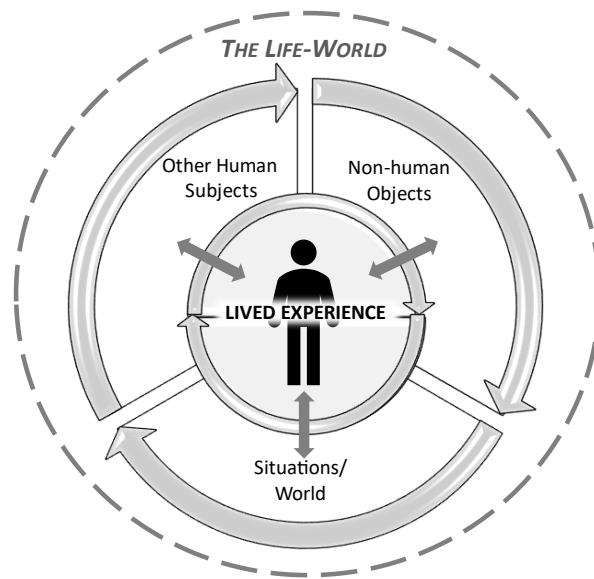


Figure 22: The Life-world in the Process-Praxeological Context

Central to the concept of the life-world is the notion that human subjects are embedded intra-actively in the world and that their lived experience is embedded intra-actively in their world of other human subjects, objects, and situational intra-action. “The life-world is simultaneously my world and a world shared with others and things” (Sandberg & Dall’Alba, 2009: 354). This prioritisation of intra-action between worlds is foregrounded in process-praxeology. The concept of the life-world resonates with process-praxeology’s mutual entanglement of being, doing and knowing (Barad, 2007). The life world includes *ways of being, being with others and the lived body* as ways to understand this entanglement (Sandberg & Dall’Alba, 2009). *Ways of being* (being and doing) highlight that through specific experiences, we come to understand ourselves in the world and connect to the world through specific activities that we engage in and with others (Sandberg & Dall’Alba, 2009). The concept of *being with others* (being and knowing) directs attention to experience as socially and historically constituted and influenced by socialisation, education and work (Sandberg & Dall’Alba, 2009). The notion of the *lived body* (doing and knowing) draws attention to how particular actions, activities, knowledge and history become integrated and embodied as experience (Sandberg & Dall’Alba, 2009: 1359).

High-involvement methodologies are recommended for inquiry into lived experience (Sandberg & Tsoukas, 2011). Storytelling and in-depth interviews, complemented by observations, serve as apparatuses for knowing the lived and living experience, but process-praxeology provisions for the impact these apparatuses may have on what becomes known (Cloutier & Langley, 2016; Sandberg & Dall’Alba, 2009; Sanders, 1982). This ethical dimension adopted from Barad’s (2007) agential realism suggests that process-praxeologists request, and challenge established (known) categories through a diffractive analysis of empirical data (Barad, 2007; Holford, 2018)

### 3.7.2 DIFFRACTIVE ANALYSIS

The concept of diffraction is a phenomenon originating in the physical sciences. It is a phenomenon unique to wave behaviour and has to do with the way waves combine when they overlap and how they alter form when encountering an obstruction. For instance, radio, sound, or water waves may appear as linear, but when encountering an obstruction their form will change to circular. In thinking the natural and social sciences together, Barad (2007) applies the form-shifting attributes of diffraction to social phenomena. She positions scholars and the apparatuses used to study the world, such as theory, observations, etc., as the “obstruction” that causes phenomena to alter form. Barad (2007) proposes diffraction as an alternative to reflection, both of which are visual metaphors from the natural sciences that have penetrated social sciences. Reflection for Barad (2007) is attuned to sameness, where a reflection is a mirror image of what it encounters. Diffraction, on the other hand, is attuned to difference, as it alters what it encounters. For Barad (2007), diffraction is attuned to the differences our knowing-making practices have on the world. Barad (2007) applies diffraction as an analytical approach to the social sciences. In diffractive analysis, the researcher is enabled to attend to entanglements in reading insights and approaches through one another, that help illuminate differences as they emerge (Barad, 2007: 30). Barad (2007) argues that a diffractive analysis is a new way of thinking about the nature of difference. As articulated in Bozalek and Zembylas' (2017) approach to analysing interview data using Barad's (2007) diffractive analysis:

*“a diffractive analysis views difference as a relational ontology, that is, an effect of connections and relations within and between different bodies, affecting other bodies and being affected by them). Diffraction can then be regarded as an ethical and socially just practice, in that it does not do epistemological damage, pitting one theory/ position/stance against another, but carefully and attentively doing justice to a detailed reading of the intra-actions of different viewpoints and how they build upon or differ from each other to make new and creative visions all in all, a turn to diffraction as a metaphor and methodology requires an important onto-epistemological and ethical shift in our thinking so that we begin to take notice of the differences and transformations that emerge in specific events”.*

(Bozalek & Zembylas, 2017: 11)

In the integration of phenomenological methodologies, life-world and diffraction analysis, as a process-praxeologist, I consider a bricolaged methodology.

### 3.7.3 BRICOLAGED METHODOLOGY

As a research practice, bricolage reflects an evolving criticality in research. When various research methodologies are amalgamated, as in the case with process-praxeology such as phenomenology, life-world, philosophical analysis, material-discursive analysis and diffraction. Holford (2018) asserts that methodological bricolage is present. As a concept that refers to constructing the new from the resources one has available, bricoleurs tend to transcend the observations of disciplines (Denzin & Lincoln, 1999; Kincheloe & Berry, 2004; Steinberg, 2011). In appreciating research as an ethically-driven act, the critical organisation scholar-as-bricoleur abandons the quest for certainty “focusing instead on the clarification of his or her position in the web of reality and the social locations of other researchers and the ways they shape the production and interpretation of knowledge” (Genot, 2018: 431–432). But what does this mean for a process-praxeologist?

### 3.8 CONCLUSION: A PROCESS-PRAXEOLOGIST’S CALL TO ACTION

If you are a scholar in the field of organisation studies that resonates with the complexity of the world as articulated in process theory but have questioned its practical implications, the theoretical framework of process-praxeology will resonate. This has been my personal endeavour to give primacy to process but ground impact in the world of practitioners through the lived and living experience of organising phenomena. The theoretical framework presented responds to the limited considerations of contextual knowledge production in the study of organisations. I argue that addressing this limitation could advance the field in relevance to practitioners and in responding to Tsoukas and Chia’s (2011) call for critical organisation scholarship. Applying a phenomenological methodology of the lived and living experience situated within the life world and analysed diffractively, process-praxeology considers ethical, ontological, and epistemological implications in the knowing of organisational phenomena. This theoretical framework proposes a way to address the study of organisational phenomena by adopting a reimagined view of the organisation. This quest encompasses a journey from entity to process and from process to action. Followed by how actions collect as experience and then how experience shapes our interactions with the world. It brings to light the ethics of self and our responsibility as knowledge creators and communicators and assigns accountability to the boundaries and narratives our knowledge may strengthen or dissolve. The end of this quest converges with the discourse of critical organisational scholarship (Goldman, 2017; Tsoukas, 2017; Tsoukas & Chia, 2011).

I have interpreted the trend of newfound philosophical contributions in the field as an impasse, indicative of a call to expand the study of organisations to be inclusive of varied experiences, structures,

and contexts. Using the open-world ontology of process as a point of departure, I have unpacked its contribution to the study of organisations, organisational phenomena, and its implications on reconceptualising the organisation as process. In this, I have contemplated the value of an emergent, intra-active organisation, presenting the potential limitations evident in Weick's (1979) organising model. Using pragmatism and agential realism to address these limitations, several core complementarities to process philosophy are shown. By extending this philosophy with pragmatism's transaction, agential realism's intra-action and in the prioritisation of lived experience, I conclude with a provocation for a renewed ethico-onto-epistemology of process-praxeology that situates the life-world as within and a part of inquiry into organisational phenomena.

The process-praxeology proposed in this chapter advocates for the study of lived and living experiences to enhance understanding of the complexities of organising through self and scientific inquiry as mutually entangled and constitutive processes. Drawing on Dewey's experimentalism and Barad's agential realism, this chapter proposes an understanding of organisational phenomena as intra-active life-world experiences to help inform the dynamic intra-action between human subjects, other human subjects, non-human objects, and the world rather than a social system comprised of various static components. This theoretical framing of knowing organising phenomena has ethical implications in that, as a scholar, I am accountable for the boundaries and attributes I enable to be revealed and remain hidden. The ethical, phenomenological, and intra-active aspects of process-praxeology offer a relational, performative alternative to the representationalist study of organising phenomena. This process-praxeological call to action, therefore is a declaration to inform empirical inquiry as the bricolaged methodology with diffractive analysis to solve organising problems in the real world as an emergent, intra-active reality of constructing experiential being, doing and knowing.

What culminates from the literature as a gap in the study of shared value creation in low-resourced contexts and emerges from this framework in situating knowing in experience has garnered interest in the diverse context of the informal sector. My lived experience has exposed me to businesses within this sector, which revealed its potential as a rich site of inquiry into complex organisational issues. The next section explores this context in seeking to address the gap in the literature and determine the practical implications of reimagining organisational phenomena through process-praxeology.

## CHAPTER 4: ORGANISING THE CREATION OF SHARED VALUE IN THE DIFFRACTED CONTEXT OF THE INFORMAL SECTOR

*“Don’t give up, I believe in you all. A person’s a person, no matter how small”*

Dr Seuss

### 4.1 INTRODUCTION

A brief search on “shared value creation” in the “informal sector” will reveal no publications. Shared value creation has mostly been studied in developed economy contexts, reserved as a trend for multinational corporations or adopted within the paradigm of corporate social responsibility (Høvring, 2017; Laudal, 2018; Saenz, 2019; Spitzeck & Chapman, 2012). Studies that have addressed shared value creation within emerging economies or low-resourced contexts, contrastingly, reveal insights into the dynamism of the shared value creation process (Alberti & Belfanti, 2019; Alcaraz & Hollander, 2019; Azmat et al., 2015; Bulcke et al., 2020; Colovic et al., 2019; Florin & Schmidt, 2011). While prior research has focussed on measuring the scale of informal economic activity or advocated for its formalisation, there remains a gap in harnessing the value of social embeddedness to foster the creation of shared value.

This is surprising in that my lived experience positions informal businesses as rich microcosms for understanding complex organisational phenomena. This experience, convergent with the findings in previous chapters, presented a strong motivation for studying an unstudied phenomenon in an understudied context within organisation studies. It strongly resonated with my new ontology of process-praxeology. This entailed that I have ethical accountability as a creator and communicator of knowledge to dissolve the boundary that separates informal businesses from conversations of shared value creation, sustainability, and strategy. Ultimately, informal businesses present an ideal site of inquiry for the study of shared value creation.

The informal sector often operates within unique contexts and is so closely integrated within the communities it serves that they cannot be abstracted when studying organisational phenomena (Even-Zahav & Kelly, 2016; Korsunova et al., 2022). Understanding the complexities and nuances of these businesses necessitates an approach that values contextual knowledge. Process-praxeology suggests the need for organisational scholarship to challenge existing narratives and encompass diverse experiences, structures, and contexts. This call for critical scholarship pertains to the informal sector, which has been excluded from the study of shared value creation and yet exists in various forms across different regions and cultures. Understanding these variations and their impact on organising processes is promising for new insights.

Lastly, the reimagined organisation and phenomena as intra-active life-world experiences motivate a study in the informal sector. These microcosms are representative of diffused boundaries between work and life, formal and informal, business and community. As embedded and unbound organisations, an empirical study on informal businesses could illuminate how shared value creation is entwined with lived experiences, which may offer valuable insights for practitioners (Miles et al., 2014). In summary, these motivations present a strong case for studying shared value creation in informal businesses.

## 4.2 BACKGROUND

In June 2015, the International Labour Organization (ILO) adopted Recommendation 204, which termed historical in the context of labour standards, to facilitate the transition from the informal to the formal economy (International Labour Organization, 2015). The recommendation problematised the informal sector by highlighting the necessity for its formalisation, which has a widespread impact throughout the globe.

The Recommendation, for instance, was attributed as the driving force behind establishing a new Task Team by South Africa's Department of Employment and Labour in February 2023 (Department of Employment and Labour, 2023). The Task Team's directive was to conduct inspections in the informal economy. In 2021, Statistics South Africa (StatsSA) reported that employment in the informal sector accounted for almost a third of total employment in the country, growing from 4,2 million jobs in 2013 to 5,0 million in 2019 (Statistics South Africa, 2021).

The ILO's concern with informal employment rested in the unregulated nature of working conditions. The scope of the sector is largely dependent on a country's "degree of economic, social and institutional development", with higher rates of informal economic activity occurring in lower-income countries (International Labour Organization, 2023: 15). This context demonstrates how the informal economy, both in academia and policy contexts have become associated with undesirable narratives of needing regulation and transitioning to formalisation, while the positive outcomes of informal economic production activities have been largely overlooked (Department of Employment and Labour, 2023; International Labour Organization, 2023; Moyo, 2016; Statistics South Africa, 2021; Williams & Nadin, 2012).

Studies of informal businesses in low-resourced contexts have demonstrated the vital role they play in poverty alleviation, food security and local development, providing goods and services to markets often excluded from large, formal providers and retailers (Crush & Young, 2019; Nickanor et al., 2019; Resnick et al., 2019; Tawodzera, 2019).

Even though studies of shared value creation in the informal sector are non-existent, the nature of informal economic activities positions these businesses as potentially navigating all three pathways of creating shared value. Firstly, informal businesses are rethinking products and markets by catering products and services to the needs of low-income markets. Secondly, informal businesses redefine productivity in their value chains through necessity-driven localisation (Porter & Kramer, 2011). Business owners often employ unregulated principles of trust with consumers, competitors, and suppliers, which enable the uninhibited flow of resources within a geographically localised value chain (Azmat et al., 2015). Finally, because of their localised economic activity, informal businesses enable local cluster development by sourcing employees from existing social relations (Porter & Kramer, 2011)

This presented an opportunity to challenge existing constructs of shared value creation and enhance understanding of how the concept is realised, extended, and studied. This chapter responds to this opportunity and the essential role of informal economic activity in developing economy contexts. In addition, the role of business in society has been reimaged by advancing the role of informal entrepreneurs as catalysts of shared value creation. The research questions this chapter seeks to address is how localisation as a characteristic of informal economic activity creates shared value. Inspired by the theoretical framework of process-praxeology, which gives primacy to process, action, and context, this chapter explores how informal business entrepreneurs interact with social and material resources to realise shared value creation (Barad, 2007).

Drawing on qualitative, in-depth, digital life story interviews and the analysis of narratives and action nets, this chapter sets out to study the emergence of shared value creation in localised, informal economic activities. The findings present a novel expression of shared value creation as an emergent outcome of informal business entrepreneurship, highlighting the dynamic, socially embedded, and relational interconnectedness of shared value creation in practice. The contribution of this chapter is to offer new insights into the study of shared value creation in diffracted contexts that could inform corporate practice to address dualistic tensions that have emerged in previous studies of shared value in dominant contexts.

What follows is an overview of key concepts to provide a background to the chapter, a presentation of the methodology and findings, and a discussion of the implications for theory, practice, and future research.

### 4.3 LOCALISATION AS A PATHWAY FOR CREATING SHARED VALUE

Shared value creation has attracted much attention in the field of management and organisation studies. Developed by Porter and Kramer (2011), the concept refers to policies and operational practices that seek to create simultaneous economic and social value. As a competitive strategy, the creation of shared value is defined as rethinking products and markets, redefining productivity in the value chain and enabling local cluster development (Porter & Kramer, 2011). Typically applied to large corporations, the concept has been highly contested in the literature as an unoriginal construct, as counterintuitive, and often in conflict with corporate objectives (Castro-Martinez & Jackson, 2015; Crane et al., 2014; Font et al., 2016; Kim, 2018; Mendy, 2019; Wegener et al., 2021). Despite these contestations, the concept has gained popularity with academics and practitioners alike, catalysing corporates to rethink their role in society and their impact on the communities within which they operate (Alcaraz & Hollander, 2019; Blowfield, 2012; Daniel & Sojamo, 2012; Lee et al., 2021; Spitzack & Chapman, 2012). Based on a systematic review of the literature, most empirical studies of shared value creation have favoured large corporate contexts and positivist ontological and epistemological frameworks (See Chapter 2). A consequence of this representationalism has been shown to reify boundaries between the organisation and its environment, which has revealed recurring tensions that this chapter seeks to reconcile. These include the tensions between economic and social value, as well as between the conceptual intent of shared value creation and how it has been realised in practice. Shared value is intended to reimagine the purpose of business in creating added value that encompasses social objectives rather than distributing existing value.

Although not explicit, two of the pathways introduce localisation as a strategy for creating shared value. In the pathway of redefining productivity in the value chain, Porter and Kramer (2011) advise that corporates consider their use of resources, energy, logistics and procurement. In their article, Porter and Kramer (2011) present cases of exemplary corporates who have reduced their consumption of energy and resources by localising their logistics and shifting their procurement to include small, local suppliers. They argue that when corporates reconceptualise the boundaries of their organisations beyond spatial dimensions, it enables them to reconsider how their operations impact and affect various stakeholders within their value chains (Porter & Kramer, 2011). An overarching theme of integration emerged in the literature on the value chain pathway of shared value creation that supports redefining organisational boundaries as unbounded when conceptualising how value is created (Azmat et al., 2015; Bulcke et al., 2020; Mirvis et al., 2016; Salo, 2015).

Glauner (2019) positions redefining the role of business in society as a necessary process for the value-added participation required to create shared value (Glauner, 2019: 504). When corporates seek to enable, enhance, and enrich value chain productivity, as Glauner (2019) argues, the adoption of a multi-

level perspective is required in how they define value. Below (Figure 23) is a graphical depiction of these multiple levels Glauner refers to (2019: 504).

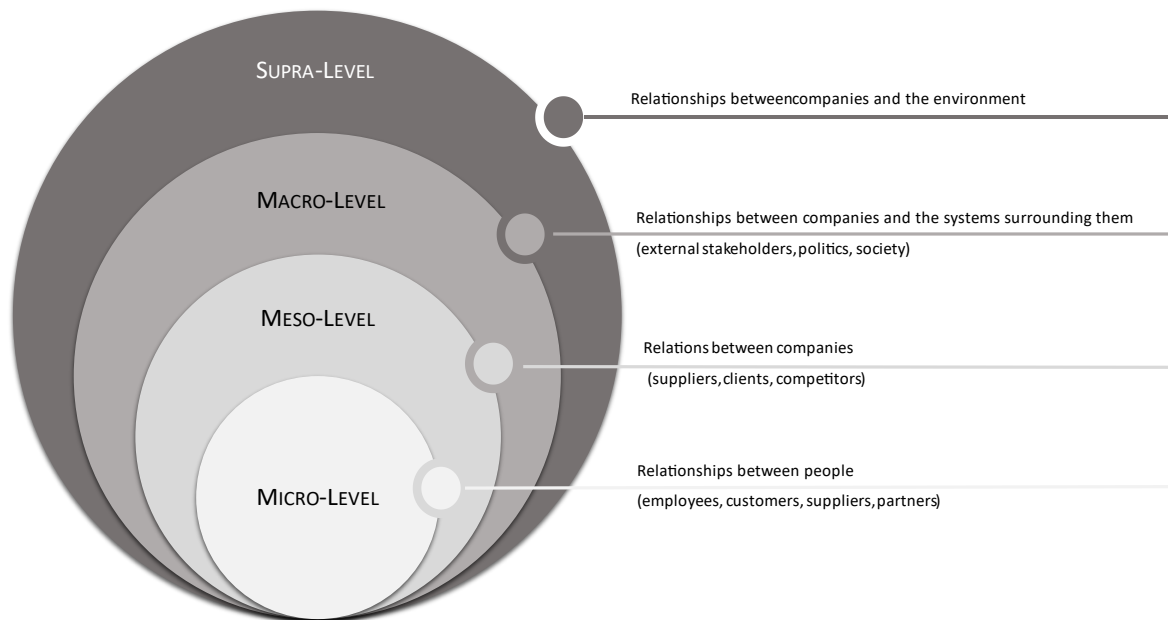


Figure 23: Glauner's Multi-Level Perspective of Business in Society (Source: Author's Own)

Glauner's (2019) multi-level perspective imposes a relational definition on organisational boundaries that encompasses relationships between suppliers (meso-level), society (macro-level) and the environment (supra-level). Redefining value and the role of business in society as relational facilitates both social and economic progress to be positioned equitably and addressed using value principles (Mirvis et al., 2016; Salo, 2015). Advocates of shared value creation support this integrative, relational view of organisational boundaries as an enabler of creating shared value (Alcaraz & Hollander, 2019; Azmat et al., 2015; Bulcke et al., 2020; Mirvis et al., 2016; Porter & Kramer, 2011; Salo, 2015). Thus enabling the dynamics of mutual benefit advocated for by shared value creation to become an integral part of doing business.

This perspective aligns with Porter and Kramer's (2011) suggestion of how companies could begin redefining productivity in their value chains to create shared value. They suggest a starting point for companies should be to geographically evaluate their existing networks of supply and distribution. The objective is for companies to identify potential gaps or weaknesses in these geographically clustered networks. Following the network gap analysis, Porter and Kramer (2011) suggest that companies evaluate how these gaps could be addressed in ways that could simultaneously improve corporate growth while contributing to local infrastructure and development. Their suggestion encompasses the

imperative of creating shared value through the pathway of local cluster development (Porter & Kramer, 2011). A gap has, therefore, emerged in the literature on how organisations internalise their externalities. In other words, it is how organisations register, interpret, and internalise social issues within their environment to create shared value, as aligned to its conceptual intent.

#### 4.4 PRIORITISING PROCESS AND INTRA-ACTION

In support of a boundless, relational organisation and aligned with the opportunity to address both the conceptual and empirical gaps in the shared value creation literature, the informal sector emerged as a seemingly diffracted context in the study of shared value creation (Barad, 2007). This context has been differentiated in its mattering yet has the potential to overcome the recurring tensions of corporate shared value practice, as revealed in the literature (Castro-Martinez & Jackson, 2015; Corner & Pavlovich, 2016; Crane et al., 2014; Florin & Schmidt, 2011; Saenz, 2019). The informal sector, as defined in the ILO recommendation, is a constituent of the informal economy that includes informal employment (International Labour Organization, 2013). The sector includes informal enterprise units, such as households and subsistence agriculture, as well as own-account workers that generate profit for subsistence.

The nature of economic activities in the informal sector is notably localised and socially embedded. Customers, suppliers, competitors, and employees tend to be geographically clustered in close proximity to the enterprise due to necessity and ease of communication and accessibility (CeSTII, 2021). This necessity-driven localisation and socially embedded nature of informal business activity mutually creates social value with economic value in the business (Korsunova et al., 2022). A consequence of this mutual constitution of social and economic value means that informal business failure imposes negative consequences that extend beyond the physical boundaries of the enterprise. Similarly, a growing informal business expands its social and economic footprint beyond its immediate environment.

Entrepreneurs operating businesses in the informal economy play a vital role in providing goods and services to low-income, township or rural markets and localising their production activities out of necessity and tend to source employment and skills from their immediate social networks. Informal entrepreneurs accumulate social and material resources in the form of skills and financial support to mobilise their business activities. According to a study on innovation in the informal economy conducted by the Centre of Science, Technology and Innovation Indicators (CeSTII) in 2019, surveying close to 1,000 informal businesses, most informal entrepreneurs reported that their primary customers were individuals or households (94,6%), who resided either inside (39,0%), or immediately outside

(54,3%) their local neighbourhood. In addition, more than half reported that their supplies were locally sourced (55,7%), and of those that were employed (68,3%), reported that more than half of their employees were family members (52,2%).

This prevalence of localised economic activities and strong social networks emerges as a critical survival strategy in low-resourced markets (Azmat et al., 2015; Korsunova et al., 2022). It has been argued that when material resources are low, resources in social capital become the primary source of capital driving economic activity (Azmat et al., 2015; Korsunova et al., 2022; Nahapiet & Ghoshal, 1998). As closely integrated as unbound organisations within their local contexts, the informal sector presents an opportunity to study a boundless, relational organisational structure.

#### 4.5 THE INFORMAL SECTOR AS A CONTEXT FOR SHARED VALUE CREATION

The informal sector offers a unique position for the study of shared value creation. The mutual contribution of informal businesses providing low-income markets with goods and services, supporting enterprise development through strengthening local value chains and enabling development in local clusters are three intersecting dimensional pathways of shared value creation.

Shared value creation, as the mutual evolution of social and economic value, is realised as an outcome of informal sector necessity-driven localisation (Azmat et al., 2015; Korsunova et al., 2022; Porter & Kramer, 2011). Thereby positioning informal businesses as key enablers of local development clusters (Azmat et al., 2015; Blowfield, 2012; Mair et al., 2012; Ollivier De Leth et al., 2022). These activities lead to localised opportunities for shared value creation. Given that informal economic activity is heightened in resource-constrained contexts, the contribution of informal entrepreneurs in building inimitable local-community transactional systems with a potential to alleviate poverty becomes a necessary area to explore (Charman & Govender, 2016; Chikazunga, 2013; Even-Zahav & Kelly, 2016; Korsunova et al., 2022; Koveos, 2020; Song, 2016).

What could be termed as entrepreneurial bricolage, informal entrepreneurs use, combine and source resources within their immediate environment to improvise and enact value creation (Azmat et al., 2015). The hybridity of their resource-exchanging processes and necessity-driven localisation positions informal entrepreneurs uniquely to address socio-economic issues attributed to the lack of economic and employment opportunities (Azmat et al., 2015; Blowfield, 2012; Howaldt & Schwarz, 2017; Ollivier De Leth et al., 2022; Pansera & Owen, 2018). Informal enterprises are potentially critical leverage points for creating and scaling shared value.

Studies of shared value creation in the formal business context and developed economies have revealed the tensions or strategic paradoxes that emerge in attempting to create mutual economic and social value, questioning the role of business in society (Blowfield, 2012; Jose, 2016; McIntosh et al., 2016; Moon & Parc, 2019). Contrastingly, studies that have been employed on hybrid business models or emerging economy contexts demonstrate a problematisation of existing definitions and structures of organisations as constraints to creating shared value (Alcaraz & Hollander, 2019; Azmat et al., 2015; Berti & Mulligan, 2016; Castro-Martinez & Jackson, 2015; Colovic et al., 2019; Florin & Schmidt, 2011; Salo, 2015; Spitzack & Chapman, 2012). These studies reveal that the pursuit of shared value creation, while an economic imperative, requires a shift towards conceptualising fluid business models, which aim to pluralise how value is defined.

Informal business entrepreneurship operates within a local cluster of economic activity, creating locally clustered shared value (Alcaraz & Hollander, 2019; Azmat et al., 2015; Porter & Kramer, 2011). One of the key themes underlying informal economy entrepreneurship is how these entrepreneurs respond to social problems by filling the product and market gaps left by existing private and public institutions. Empirical studies of shared value creation, with the exception of one, present a linear process adopted in practice, while Azmat et al's., (2015) study of subsistence marketplaces demonstrates the non-linearity and recurrence of shared value in low-resourced contexts (see Figure 24).

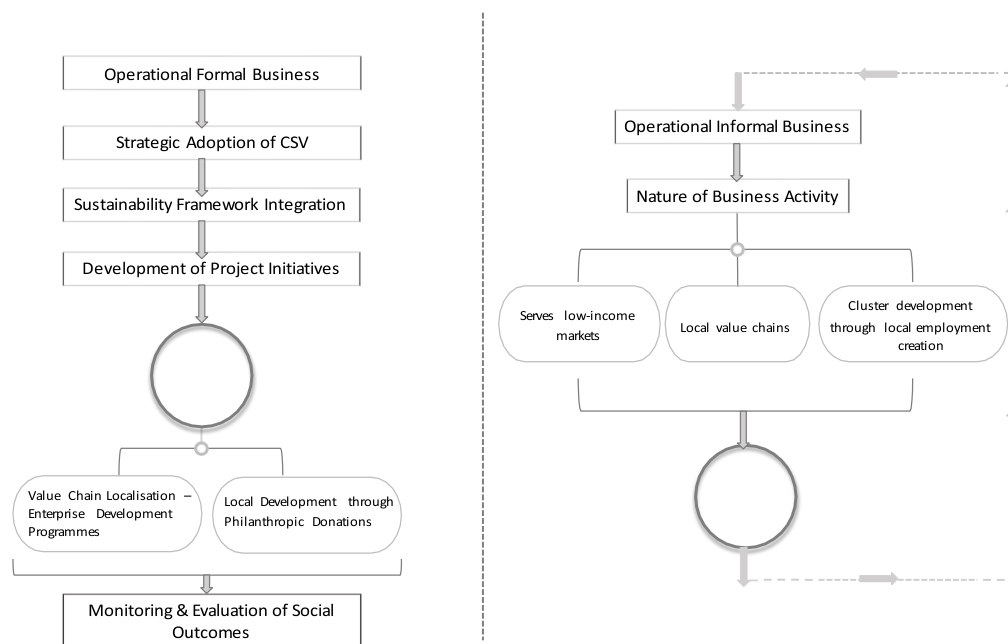


Figure 24: A Comparison of CSV in Formal and Informal Enterprises

The analysis that follows investigates this non-linear, relational recurrence of shared value creation in the context of informal businesses as interpreted by the entrepreneurs who own them. Through their life stories, a narrative of shared value creation emerges that demonstrates the relational nature of the concept. These relational insights offer an opportunity to overcome the dualistic tensions that have

emerged in the extant literature. The following section describes how these objectives have been operationalised in the research process.

## 4.6 RESEARCH PROCESS

This research did not follow the exemplary template of academic methodologies but rather emerged organically from the serendipitous intersection of events. Between 2019 and 2021, during a research internship, I was responsible for fieldwork management and data collection for a baseline study aimed at measuring innovation in the informal sector. The research was initiated by the Centre for Science, Technology, and Innovation Indicators (CeSTII), a division within the Human Sciences Research Council (HSRC), South Africa, funded by the Department of Science and Innovation (DSI). The study employed a novel mixed methodology, which included a small area census and a quantitative survey on measuring innovation in 996 informal firms. The qualitative component of the study involved close to 100 semi-structured interviews and two participatory digital storytelling workshops comprising informal entrepreneurs located in a peri-urban area of KwaZulu-Natal, South Africa. The three years of intense data collection intersected with my first three years of doctoral research within the area of shared value creation.

While the data collected prioritised innovation, the methodological approach sought to understand the social linkages that embedded the business within the community. It was premised on the organisation as unbound, therefore presenting the opportunity to study shared value creation. The research interest then emerged in considering the concept within informal contexts. Upon completion of a systematic review of the shared value creation literature, this interest was affirmed as a gap, and collectively, with the development of the theoretical framework of the study that prioritised process and lived experience, it became evident that the rich, contextually embedded storytelling data be revisited from this renewed perspective.

### 4.6.1 DIGITALSTORYTELLING: A PARTICIPATORY, CO-CREATIVE METHODOLOGICAL ENTANGLEMENT

Digital storytelling has been recognised as a participatory and therapeutic research methodology that enables participants to reflect on their lived experiences through a dialogical process of facilitated story production (Wood et al., 2015). It is defined as “the practice of using computer-based tools to tell stories”. It has been described as an emergent “personal story with video, still-frame imagery and voice to create a personal multimedia story” (Sawyer & Willis, 2011: 275). As participants in the storytelling process begin to make sense of their experiences, they begin to realise how they have adjusted their

behaviour in understanding various aspects of their lives (Sawyer & Willis, 2011: 276). Digital storytelling is a powerful tool for giving a voice to those who have not had the opportunity to express their stories and, in the context of this research, was used as a participatory methodology to transcend cultural and linguistic boundaries (Rule, 2010). Giving a voice to the often marginalised, digital storytelling has been positioned as a co-creative methodology that decolonises experiences for the benefit of a wider audience (Robin, 2008).

To provide an insightful, in-depth answer to the research question of how informal businesses create shared value, this chapter explores the digital stories produced by thirteen informal entrepreneurs, which took place in two separate workshops. Although the digital storytelling methodology is not new, it has been popularised as a movement by Joe Lambert and Dana Atchley through the founding of the Centre for Digital Storytelling (CDS), who have positioned the methodology as a pathway for social change and sensemaking (Robin, 2008).

The two workshops were conducted over the course of the research period the first workshop was conducted in 2019, followed by a second workshop in 2021. As per the recommendations of Lambert (2013), the first workshop took place over the course of five days, and the second workshop took place over four days. Lambert (2013) recommends a minimum of three days with twenty-one hours of interactive contact time with participants to facilitate the storytelling process as co-creative. The seven steps of digital storytelling were followed iteratively, depicted in Figure 25 below.

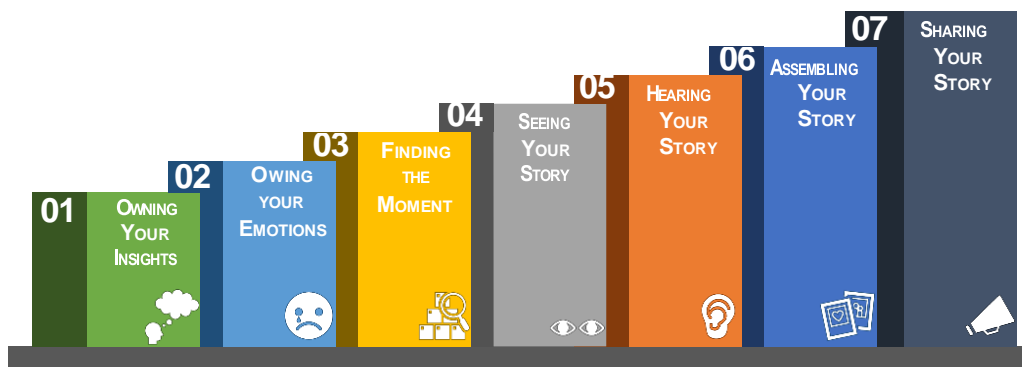


Figure 25: The 7 Steps of Digital Storytelling. Source: Author's Own adopted from Lambert, 2013 pgs. 53-57

The content of the workshops was informed by these seven steps which were structured in three phases following the recommendations of Lambert (2013) (see Table 9). Each workshop had a lead facilitator with extensive experience in using digital storytelling as a research method. The lead facilitator was supported by five co-facilitators who constituted the research team and a digital media specialist who recorded certain workshop sessions and assisted participants with photographing their story world (sculptures made from modelling clay).

Table 9: Overview of Digital Storytelling Workshop Programme

<i>Phase One: Introduction</i>	
<b>Seven Steps</b>	Briefing of Steps – Workshop Overview
<b>Story Circle</b>	Present initial ideas to the group, establish ground rules
<b>Script, Image Selection &amp; Storyboard</b>	Individualised support on story structure and image selection
<i>Phase Two: Story Scripting</i>	
<b>Image Creation and Selection</b>	Use of index cards to summarise the story
<b>Rough Draft of Story Script</b>	Drafting of a script for group sharing and facilitator input
<i>Phase Three: Final Design and Production</i>	
<b>Software Tutorial</b>	Use of technology
<b>Image Import</b>	Uploading of images in software
<b>Voice Over</b>	Recording of voice-over story practice
<b>Final Story Production</b>	Facilitator-guided collation of images, voice-over and script

Phase one of the workshop began with introductions and various team-building activities to facilitate rapport between participants and facilitators. Various components of storytelling, including the seven steps and the structure of a story, represented by a narrative arc, were presented to participants (Boyd et al., 2020).

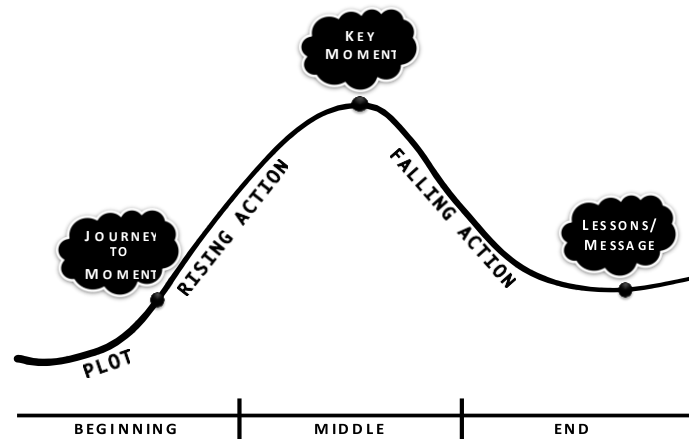


Figure 26: Narrative Arc used in Digital Storytelling Workshop

During the workshop, participants were asked to produce a “true story of a time they did something different in the way they ran their business”. The question was intended for business owners to reflect on their business journey, identify how they innovated and what the outcomes were of their innovations. The serendipity of digital storytelling as a research methodology is that it prioritised the entwinement of storytelling with digital technology. Despite structuring the workshop around innovation, the interview questions prompted informal entrepreneurs to reflect on their business journey. Because occupation plays such a resonant role in identity, where defining what one does forms a predominant

proportion in defining who one is, the questions prompted the creation of stories that were representative of identity narratives and lived history of participants (Lambert, 2013). This provided the opportunity for these stories to be analysed for varying purposes.

The team facilitated the story creation process by prompting participants to reflect on their entrepreneurial journey and moments that affected them or led them to change their course. They were prompted to reflect on these moments in detail by describing the emotions they experienced and what they learned from those experiences (de Jager et al., 2017; Lambert, 2013). Once participants had a first draft of their story, they were guided on image placement and asked to reflect on the imagery of these placements in their story. In some instances, participants had existing images that could be used to express these images visually, but in other instances, new images were created.

Participants were provided with various artistic materials to create new story images (Lambert, 2013). Various modalities such as paint, oil pastels and modelling clay were used to create works that were later photographed to be included in the collection of images for participants' stories. After refining their story scripts and deciding on image placement, the selected images were imported onto a tablet and assembled in order. The final step of story assemblage was to record the storyteller's voice-over narration to produce the audio-visual story output.

As a co-creative process, digital storytelling is aligned with Karen Barad's theory of agential realism by encompassing the fusion of narrative and technology. This integration of material and discursive elucidates the practices of meaning-making (Barad, 2007). According to Barad (2007), boundaries are constructed through these material-discursive practices, in which some parts of the world become salient in our experience. In this context of agential realism, the concept of the apparatus becomes relevant. Apparatuses serve as the device that enables the construction of boundaries and assigns properties and meanings within a context (Barad, 2007, 2014; Barla, 2021; Dunk, 2020; Visser & Davies, 2021). In the digital storytelling process, the apparatus becomes collectively composed of the research question, the story arc, and the previous digital stories showcased to the participants. It is within the boundaries of the storytelling apparatus that participants determine which material configurations of their experience are to be shared.

The storytelling apparatus encapsulates what Hernes et al. (2021) articulates as material temporality. Constituting both the processual and epochal aspects of temporality, the storytelling apparatus shapes the selection of past experiences to recount a story and its anticipated ending imbued with hope or inspiration. Therefore, the digital storytelling methodology, with its storytelling apparatus, encompasses the ethical, ontological, and epistemological aspirations of the process-praxeology theoretical framework.

#### 4.6.2 BACKGROUND OF THE PARTICIPANTS

As mentioned previously, this data forms part of a larger study to measure innovation in the informal sector. The data used for analysis comprised thirteen digital life stories of informal business entrepreneurs operating in a peri-rural location of KwaZulu-Natal Province, South Africa. Below is a description of each participant, along with a short biography they submitted as part of the storytelling workshop.

##### ***Participant 1, Ayanda<sup>5</sup>, Female, Hair Industry***

Ayanda describes herself as a humble person who likes to help people. She loves her family. She is a hard worker and says, 'shortcut is not my business'. Ayanda is a florist and bead garment maker.

##### ***Participant 2, Kagiso, Male, Agriculture***

Kagiso describes himself as humble and hardworking. He likes people, hates shortcuts, and is always hungry for knowledge. Kagiso transports school children and works with his wife growing and selling produce.

##### ***Participant 3, Nofoto, Female, Hair Industry***

Nofoto describes herself as a resilient queen. Her life has never been easy but because she knows where she comes from and where she's going, she has learnt to look past any obstacles. There will always be difficulties in her life, so she says there is no point in focusing on that. Instead, she believes to keep going and be optimistic. Nofoto runs a hair salon in her local area.

##### ***Participant 4, Thadie, Female, Hair Industry***

Thadie is the mother of two kids. She describes herself as a good person who likes people and likes to work with others as a team. Thadie runs a hair salon in her local area.

##### ***Participant 5, Ulwazi, Female, Hair Industry***

Ulwazi is a hairstylist who is grateful for acquiring the knowledge and resources to run a successful business.

##### ***Participant 6, Lerato, Female, Hair Industry***

Lerato describes herself as kind and friendly, and she enjoys meeting other people. She is the mother of two daughters and runs a hairdressing business.

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<sup>5</sup> All participant names are pseudonyms

***Participant 7, Funani, Male, Retail***

Funani runs a tuckshop with his wife. They are currently looking at how they can improve and would like to open another store in the area. He says that his family continually supports their business.

***Participant 8, Langa, Male, Barbershop***

Langa describes himself as 'just a simple guy' who likes working with people. Peace is very important to him. He aims to work towards a brighter future and to bring change for a united, loving nation. Langa owns a barbershop.

***Participant 9, Msizi, Male, Construction***

Msizi has a daughter. He loves going to church. He says, 'I am alive today because of my family and God.' He also runs a tiling and repair business with his friend.

***Participant 10, Nkosiyabo, Male, Construction***

Nkosiyabo is a husband and a father to 10 children. He owns a construction business.

***Participant 11, Sindisiwe, Female, Hair Industry***

Sindisiwe loves weaving and learning other things. She describes herself as someone who loves sharing knowledge. She runs a hair salon in her local area.

***Participant 12, Mpilo, Male, Retail and Repairs***

Mpilo runs a small retail and shoe repair shop. He aspires to grow his business and wishes to have multiple stores someday and to sell goats. He says, 'I can persevere even when faced with hardships.'

***Participant 13<sup>6</sup>, Lwandle, Male, Tiling***

Lwandle describes himself as a hard worker, someone who loves what he does, lends a helping hand, and sees other people succeed. He runs a tiling business.

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<sup>6</sup> All participant names are pseudonyms

#### 4.6.3 ANALYTICAL FRAMEWORK

Guided by the theoretical framework of process-praxeology, which situates lived experience and life histories as central to sensemaking, the analysis adopted a two-staged approach to give primacy to process, performance and becoming (Barad, 2007; Tsoukas & Chia, 2011; Weick, 1979). Firstly, in order to understand the ongoing performance of informal entrepreneurship, an action net was knotted together centred on the activity of opening the business. The action net analysis revealed how ongoing interactions between identity, narrative and behaviour become the organising actions of informal business activity, decision-making and the emergence of shared value-creation narratives. Therefore, the second stage involved a narrative analysis to understand the organising interactions between identity, narrative, and behaviour within the context of informal entrepreneurship and shared value creation.

Traditionally, organisational analysis centred on the reified organisation as a structural outcome of action or practice (Czarniawska, 2004). However, Weick's (1979) introduction of the concept of organising, in which the organisation is never fully realised but in a constant process of becoming, has since shifted some organisational scholars to consider structure as a "temporary reification" of the Organisation (Bakken & Hernes, 2006; Czarniawska, 2004, 2008; Lindberg & Czarniawska, 2006; Weick, 1979; Weick et al., 2005). As reasoned by (Czarniawska, 2004: 780):

*"the action net perspective presents a "compromise...to embrace both the anti-essentialist aspect of all organizing (organizing never stops) and its apparently solid effects (for a moment things seem unchangeable and ('organized-for-good'))"*

The concept of an action net is based on the notion that actions rather than actors create these temporary reifications of organisations across time and space (Czarniawska, 2004). It originated "in a combination of new institutional theory and the sociology of translation" but has since been tailored by Czarniawska (1997, 1998) for organisational studies (Czarniawska, 200: 780). These reifications shape organising by determining which actions should be linked together and can, therefore, transpose meanings to these actions from one context to another through processes of translation and espousal. Czarniawska expresses the ambitions and value of knotting an action net eloquently in her 2004 article, *On time, space, and actions nets*:

*"The concept of an action net has no analytical ambitions; its introduction is an attempt to minimize that which is taken for granted prior to the analysis. A standard analysis begins with 'actors' or 'organizations'; an action net approach permits us to notice that these are the products rather than the sources of the organizing – taking place within, enabled by and*

*constitutive of an action net. Identities are produced by and in an action net, not vice versa.”*  
(Czarniawska, 2004: 780).

Actions, in the context of action nets, include both physical and verbal modalities of performance and the articulation thereof (Czarniawska, 2008, 2011b, 2011c, 2011a; Hallin, 2009). In contrast to network analysis, action nets first establish the action and interaction, then attribute these relationships to an actor. Whereas network analysis first defines agents or nodes and then seeks to map their interrelations or networks (Cavanagh, 2015; Ferraro et al., 2015; Lindberg & Czarniawska, 2006; Lindberg & Walter, 2013a).

The first stage of knotting an action net together informal business entrepreneurship involved coding the story transcripts by identifying the action of opening the business and then tracing the preceding actions that led to opening the business and the actions that followed. These actions were not mapped chronologically but used kairotic time ordering, described as the “time, place, [and] circumstances of a subject”, which Czarniawska (2004) advocates for as the authentic account of experience presented in a narrative (Czarniawska, 2004: 775). A kairotic narrative has “a central subject, a geographical centre, a social centre and a beginning in time”, kairotically organised narratives are created by the narrator, embodying individual timing (Czarniawska, 2004: 776–777).

Czarniawska (2004) and Lindberg and Czarniawska (2006) recommend this form of analysis to understand actions in studies of organising. Therefore, an action net was used as a first step towards understanding the processes and emergence of shared value creation in the context of informal business practices, depicted in the narration of lived experience expressed in the stories of participants. Action net analysis is used to map the actions, narratives and exchanges of resources and activities within the context of an informal business value system. The second stage involved a narrative analysis of the intra-active material-discursive practices revealed through the digital storytelling process (Barad, 2007). The aim of the second stage of analysis was to understand how the meaning of self was constructed and abstracted from the entrepreneurial journey in the relational emergence of shared value creation (De Fina & Georgakopoulou, 2008; Flottemesch, 2013; Pentland, 1999) The next section presents a summary of the key findings.

#### 4.7 FINDINGS

In order to understand the drivers that led an informal entrepreneur to open, close, sustain or expand their business, a narrative analysis was conducted from the data collected (Heliker, 1997; Pentland, 1999). The storytelling transcripts were exported to NVivo and analysed to determine the interactions between events, dialogical exchanges and any other determinants that influenced entrepreneurs' actions.

The narrative of each individual case was analysed to determine the perceptions, influences and reflective self-talk that shaped the actions taken by the informal entrepreneurs. These actions were further analysed to determine whether the experience led to an empowering or disempowering narrative and how these narratives were articulated by the entrepreneur and manifested in their actions.

#### 4.7.1 AGENTIAL CAPACITIES AND INTERACTIONS IN THE ACTION NET OF INFORMAL ENTREPRENEURS

The analysis of the action net began by identifying a pivotal moment in the entrepreneur’s journey – the point at which the entrepreneur opened their business (indicated in yellow in Figure 27 below). This action ascribes the actant role of an informal business entrepreneur, entwining the narrative and serving as a connecting thread of a role shared amongst all workshop participants. Actions preceding and following the opening of the business were then systematically coded and positioned within the kairotic narrative of each story (Czarniawska, 2004; Gherardi & Nicolini, 2005; Lindberg & Czarniawska, 2006).

In knotting together the action net, the data underwent a three-step process of coding, categorising and visual mapping (Czarniawska, 2008; Decuyper, 2020; Gioia et al., 2013; Langley, 1999; Miles et al., 2014; Northcutt & McCoy, 2004). Initially, open coding of each story script was employed to inductively assign roles, transactions, and transactional influencers as emergent in the storyteller’s kairotic narrative. Subsequently, the codes were categorised into broader themes or nodes that represented the various interconnected components within the action net.

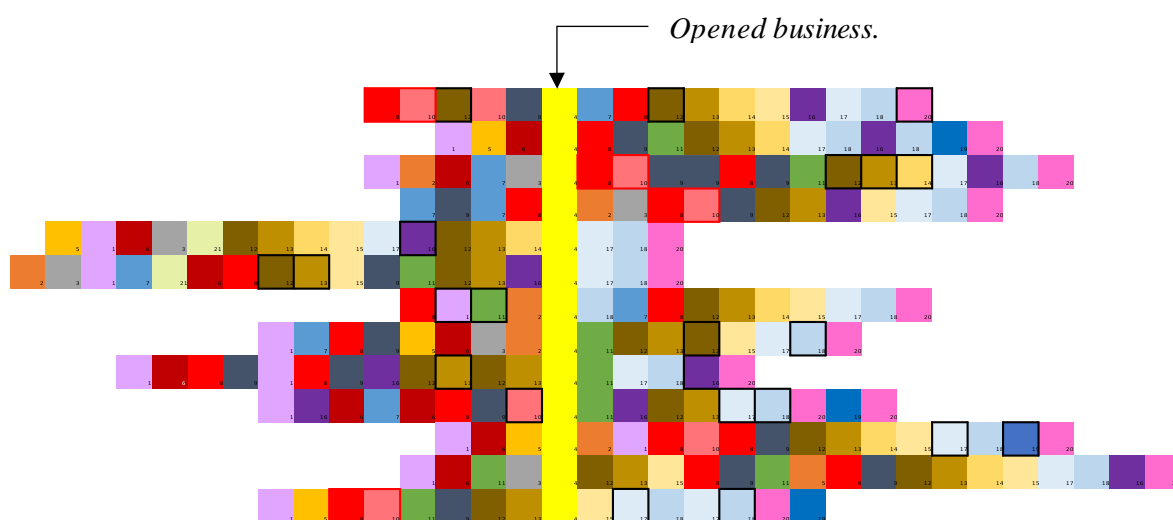


Figure 27: Coding of Kairotic Actions in Informal Entrepreneur Story Scripts

Table 10 below presents the various codes that emerged from the story scripts (Czarniawska, 2008; Decuypere, 2020; Gioia et al., 2013; Miles et al., 2014; Northcutt & McCoy, 2004).

Table 10: Coding Categories of Informal Entrepreneur Story Scripts

1	identity start	2	skills for business	3	leap of faith	4	opened business
5	social capital influence	6	build-up	7	moment before	8	key moment
9	key moment interpretation	10	immediate post-moment action	11	turning point	12	hope source
13	hope resource	14	hope output	15	hope outcome	16	narrative change
17	empowering trigger	18	empowering action	19	confirmation of success	20	key message
21	business change	22	emergent shared value narrative				

A summary of the actions that led to and emerged from opening the business is presented in Figure 28 below. The findings reveal that the most prevalent action leading to the opening of an informal business is a *leap of faith*, wherein the owner expressed confidence in their *skills for the business* or occurred after receiving some form of resources from their *source of hope*. These sources of hope were often depicted in the stories as family, friends or acquaintances who provided support or inspiration in the form of social or material resources that inspired the business owner to act on embarking on their entrepreneurial journey.

Following the establishment of the business, the most frequently mentioned actions included the owner's recognition that this marked a *turning point* in their entrepreneurial trajectory, that it *triggered* subsequent *empowering actions* or presented an opportunity for the owner to acquire *skills for the business* (see Figure 28).

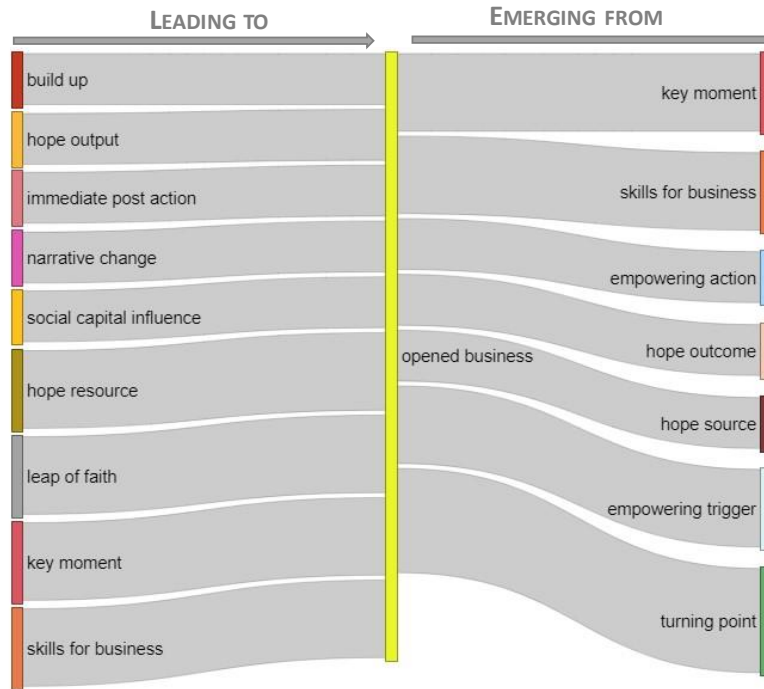


Figure 28: Most Prevalent Actions Leading to and Emerging from Opening an Informal Business

Trends of action sequences were sought throughout the data. The most salient sources of action are depicted in Figure 29 below.

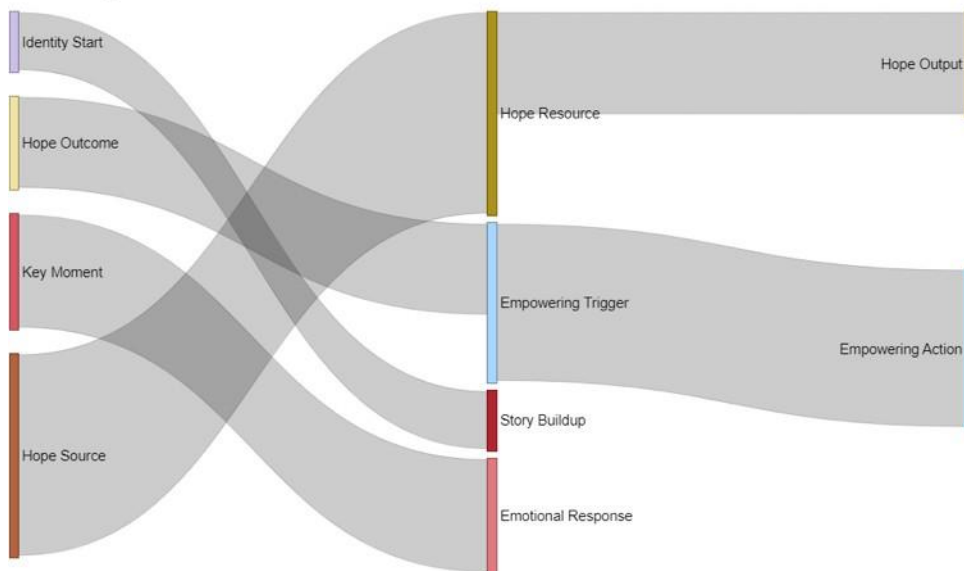



Figure 29: Notable Sources of Action Linkages

Notable, interactions between the entrepreneur and a *source of hope* often catalysed the exchange of social or material resources. In eight out of the seventeen occurrences, this exchange led to a transformative action or interpretation that altered the course of the entrepreneur’s journey. Some of

these *outputs* encompassed feelings of obligation towards the *source of hope* and *resources* received to sustain the business, the acquisition of new skills to enhance the business offering or a desire to explore alternative avenues within the business. Another notable source of action stemmed from *empowering triggers* that led directly to *empowering actions* (thirteen instances). These actions emerged as an *outcome* of the actions or interpretations from the *hope outputs* mentioned above. These outcomes encompassed initiatives to expand the business, improve business processes, or formalise the business through registration, obtaining business premises, or adding new goods and services. Some empirical evidence of this sequence of actions is depicted in Table 11 below:

Table 11: Empirical Examples of Action Sequence from Hope Source to Empowering Action



Participant No.	Hope Source	Hope Resource	Hope Output	Hope Outcome	Empowering Trigger	Empowering Action
2	Sibling	Borrowed vehicle to be able to continue with business	Continued with business	Saved money to purchase own vehicle	Sought information to grow own produce	Grew own produce and marketed to customers
3	Friend	Offered business equipment	Obligation to reopen business due to equipment received	Reopened business	Social media marketing	Identified gaps and added products to sell during service
7	Family	Talk and support to continue with business	The decision to take business seriously	Continued with business	Sought skills in business management	Improved accounting and stock monitoring processes
9	Friend	Asked to join the business	The decision to help a friend and get back to work	Joined business	Obligation to friend to improve business offering	Introduced new products
11	Family	Encouragement to keep going	The decision to continue and improve business	Sought to learn new skills to add to a service offering	Asked a friend for training	Added new service to business
13	Family	Support and encouragement to go back to work. Pressure to support the family	Encouraged to seek opportunities for income generation	Opened business	Asked a friend to join the business	Expanded business with more employees by upskilling friends

What can be concluded from these findings is the reciprocal nature of shared value creation and how the agential capacities and interactions of informal entrepreneurs ensure that value continues to be created and circulated. Upon being recipients of resources from their social capital sources of hope,

informal entrepreneurs reciprocated by opening their businesses, improving their skills or expanding their business. In some instances, entrepreneurs shared how they shared knowledge and skills to employ members within their social networks.

#### 4.7.2 ADAPTIVE SENSEMAKING AND BRICOLAGE

By extending the analysis above to include enactment, which encompasses the interaction between the entrepreneur and their external environment, the adaptive sensemaking processes of informal entrepreneurs within low-resourced contexts become evident (Weick, 1979; Weick et al., 2005). The following section first discusses the findings in relation to these sensemaking processes, followed by a discussion of how these processes are sourced through bricolage.

##### *4.7.2.1 Adaptive Sensemaking*

The concept of adaptive sensemaking refers to the processes employed by entrepreneurs in interpreting the events they encountered and selected to share in their stories. In the context of informal entrepreneurs operating in resource-constrained environments, adaptive sensemaking becomes essential for the survival of their businesses. The concept of enactment becomes relevant to interpreting how the entrepreneur interacts with their environment in shaping their sensemaking processes.

A total of nineteen events were coded from the story scripts, and the nature of the event was categorized as either personal or financial. These events depicted setbacks or challenges that entrepreneurs needed to overcome. The entrepreneurs engaged in sensemaking by selecting an assembly of actions that enabled their businesses to either mitigate risk through response (7), to be sustained (11) or expand (1) (Weick, 1979; Weick et al., 2005).

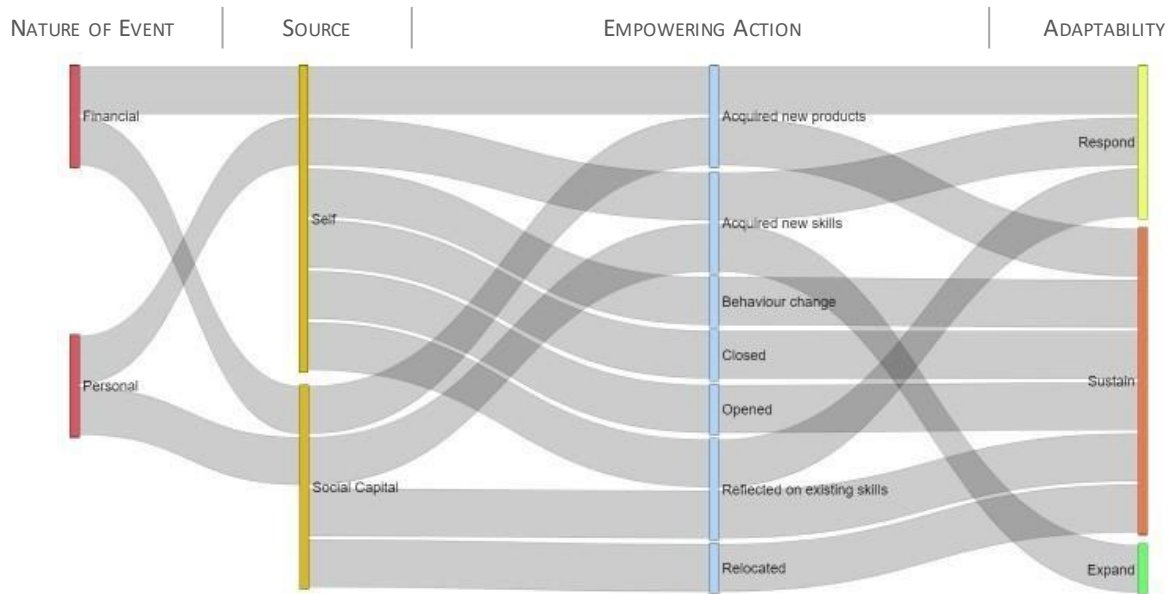


Figure 30: From Key Event to Adaptability

The process of adaptive sensemaking enables entrepreneurs to interpret and respond to challenges faced in their enacted environment. This allows them to select actions that empower them to navigate these challenges. These sensemaking processes reveal the transactional relationship between informal entrepreneurs in terms of how they adapt and respond to uncertainties in their environment.

The adaptive sensemaking of informal entrepreneurs who reported more than one event is reflective of the sensemaking processes of enactment, selection and retention described by Weick (1979) (see Table 12). Equivocality emerges from the event enacted by the entrepreneur, triggering the entrepreneur to respond by selecting an assembly of actions. What constitutes retention is when the selected actions are stored as a source to inform future enactments. As depicted in Table 12, selection in the form of narratives becomes retained and strengthened after a subsequent enactment. The retention of selected actions and narratives constitutes the adaptive sensemaking processes of informal entrepreneurs.

Table 12: Enactment and Organising Interactions of Informal Business Entrepreneurs

<b>1st Enactment</b>	<b>Behaviour</b>	<b>Narrative</b>	<b>2nd Enactment</b>	<b>Behaviour</b>	<b>Narrative</b>
Job loss	Opened business	<i>"I decided to be stronger and work hard every day"</i>	Accident	Continued with business	<i>"You are never too old to learn and in life, there are no shortcuts" (2)<sup>7</sup></i>
Lockdown	Closed Business	<i>"The experience was overwhelming. I had to fight for survival"</i>	Family death	Reopened business	<i>"There is no perfect business, there will always be hiccups along the way. All you need is hard work, resilience, and passion for what you do" (3)</i>
Family death	Opened business	<i>"To start a business is not an easy thing, you have to work hard"</i>	Theft	Relocated business	<i>"But I start again because I save 30% of my salary" (4)</i>
Promoted	Expand knowledge and skills	<i>"I was a worker who did anything thrown at me"</i>	Job loss	Opened business	<i>"All this happened with great honesty and determination" (10)</i>
Family Illness	Operated business occasionally	<i>"Life was hard, but I had to keep going"</i>	Family death	Establish and expand business	<i>"I realized it is easy when you share knowledge you have with others" (11)</i>
Resignation	Decided to operate own business	<i>"It was then that I decided that I will persevere and not lose hope"</i>	Store raided	Reflected on other skills to generate income	<i>"These experiences make you strong" (13)</i>

The extracts from respondents provided in Table 12 reveal an interrelationship emerging between the entrepreneurs' enactment and adaptive sensemaking processes to organise their business. When an empowering narrative is interpreted in response to a first enactment, it empowers the entrepreneur to respond adaptively to a second enactment. This adaptive response, in turn, strengthens the validity of the empowering narrative in the lived experience of informal business entrepreneurs, which may be reflected in a 3rd enactment interpretation. Entrepreneurs' adaptive sensemaking mutually informs the narratives of past and future enactments, which influence their subsequent actions. This enactment and the narrative interpretation thereof become articulated in the lived experience of informal entrepreneurs in an ongoing feedback loop where narrative and behaviour produce and reproduce organising interactions. This reciprocity between past, present, and future enactments reflect the temporal entwinedness of informal business organising (Weick et al., 2005)

<sup>7</sup> Number represents Participant ID

The adaptive sensemaking processes of informal entrepreneurs reveal an entwined organisation. How informal entrepreneurs organise their businesses is integrated and interdependent in its relation to society and unbounded and coevolutionary with its enacted environment (Tsoukas, 2005).

#### 4.7.2.2 Bricolage

Bricolage is an “action-oriented theory” that has been defined as a process of sourcing and combining available resources to address problems or respond to opportunities (Sonenshein, 2014: 816). First introduced by Lévi-Strauss in 1966, the concept encompasses the adaptive sensemaking of informal entrepreneurs operating in resource-constrained environments (Lambotte & Meunier, 2013; Lévi-Strauss, 1966). As depicted in Figure 30, the sources that entrepreneurs used to select actions and effect change in their business were either self-sourced or obtained from existing social capital relationships. Only three instances were reported when knowledge or product resources were acquired from a source external to the entrepreneur’s immediate social capital, which, even in this case, was incited and sought by the entrepreneur. A further breakdown of the type of resource acquired is presented in Figure 31.



Figure 31: Tangible and Intangible Resources used by Informal Entrepreneurs

In terms of bricolage, informal business entrepreneurs leverage their existing and available resources to sustain or expand their businesses or respond to customer needs. The findings highlight the social nature and contextual dependence of knowledge and resource exchange in resource-constrained contexts. These findings are consistent with other studies of entrepreneurship in subsistence marketplaces, in which strong social networks take prevalence as the primary form of capital (Azmat et al., 2015). Social capital is evidenced as the most abundant source of both tangible resources in the form of finance or equipment and intangible capital in the form of acquiring knowledge or skills. This indicates that knowledge sharing, skills transfer, and the acquisition of business assets take place within localised clusters of intimate social networks of informal business entrepreneurs. Six of the thirteen entrepreneurs shared how a strong parental influence in the form of ownership and skills transfer played a contributing factor to them being business owners themselves. Five of these entrepreneurs shared how they transfer

skills, knowledge, and employment opportunities within their social networks. These contextually embedded resource exchanges depict how value is circulated within the localised networks of informal entrepreneurs.

This situates informal entrepreneurs as optimal conduits of shared value creation since their economic success evolves mutually with localised social benefits. In its use of ‘devalued’ resources, the concept of bricolage also challenges the assumption of value creation as distributive (Azmat et al., 2015; Baker & Nelson, 2009). Therefore, it addresses the tensions between economic and social value, as well as creating added value rather than distributing existing value, as presented in the literature on shared value creation (Crane et al., 2014; Florin & Schmidt, 2011; Glauner, 2019).

Adaptive sensemaking processes and bricolage collectively constitute informal businesses as organisations entwined with their local context and community. These processes position informal business entrepreneurs as catalytic leverages for scaling shared value creation.

#### 4.7.3 PROCESSES OF REFLECTION IN EMERGENT NARRATIVES OF SHARED VALUE CREATION

As entwined organisations, informal business entrepreneurs dissolve the dichotomies between social and economic value and inform a concept of value as inclusive and collective. As such, they embody potentialities for shared value creation, which has informed the narrative analysis that follows.

Throughout the story scripts, any implicit reference the owner made to growing or contributing to shared value creation in the form of employment creation, skills development, or community outreach was coded as indicative of a potentially emergent shared value narrative. A few of these quotations are depicted in Table 13 below:

*Table 13: Quotations from Participants of Shared Value Creation*

<b>Quotation</b>	<b>Participant</b>
“Our family works with us in the business”	1
“I decided to stop looking for a job and create jobs”	7
“I started a support group in the community to encourage others to start a business”	8
“I want to share my experience to help others make better choices and create an honest living”	9
“I bought equipment, found more jobs and hired more employees”	10
“I realised that it is easy when you share the knowledge you have with others”	11
“My friend was looking for a job, I taught him the skills and asked him to join”	13

The kairotic positioning of these emergent narratives was identified in the story scripts to determine which actions or interactions were positioned as potential determinants of these narratives emerging. The findings reveal that a narrative of shared value most often emerges after an informal entrepreneur interacts with a *source of hope* (5), someone who has inspired or supported them to continue with their business (see Figure 32). It is also interesting to note that a narrative often emerges after the owner has been a recipient or beneficiary of a tangible or intangible *resource* (4) from their *hope source*, which suggests the potential transmittable impact of shared value creation. The findings reveal that reported interactions with a source of hope and exchanges of resources received from this source, collectively serve as catalysts for initiating and sustaining informal entrepreneurship.

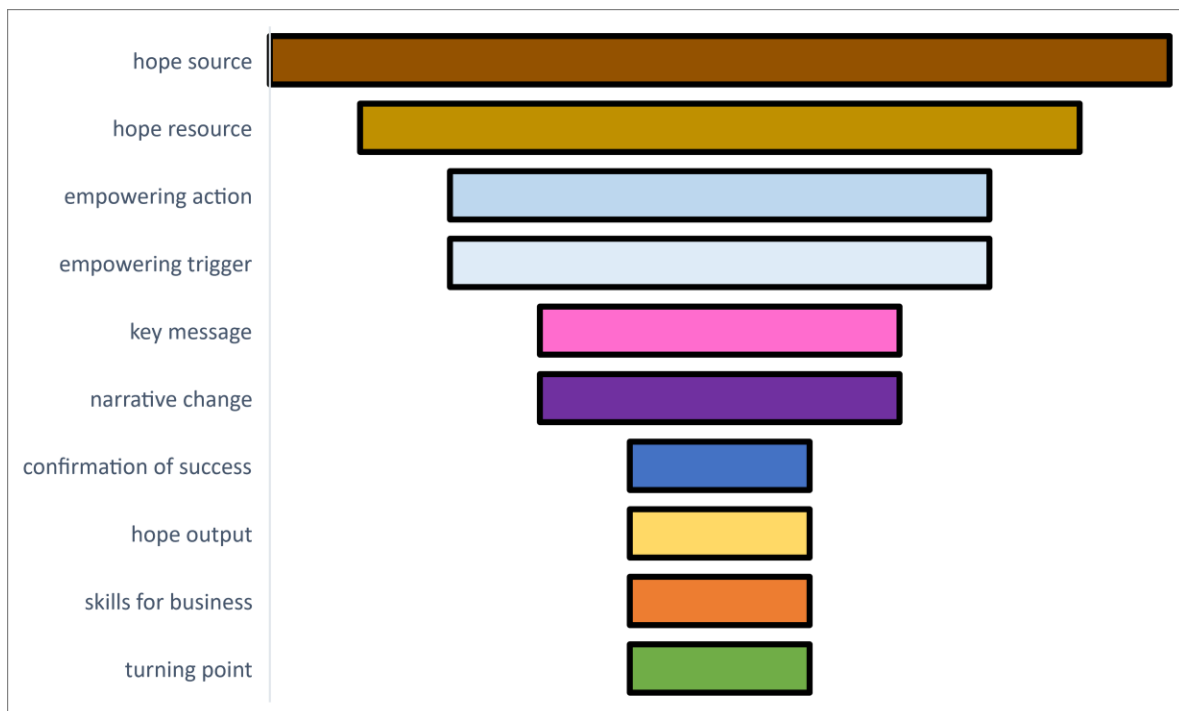
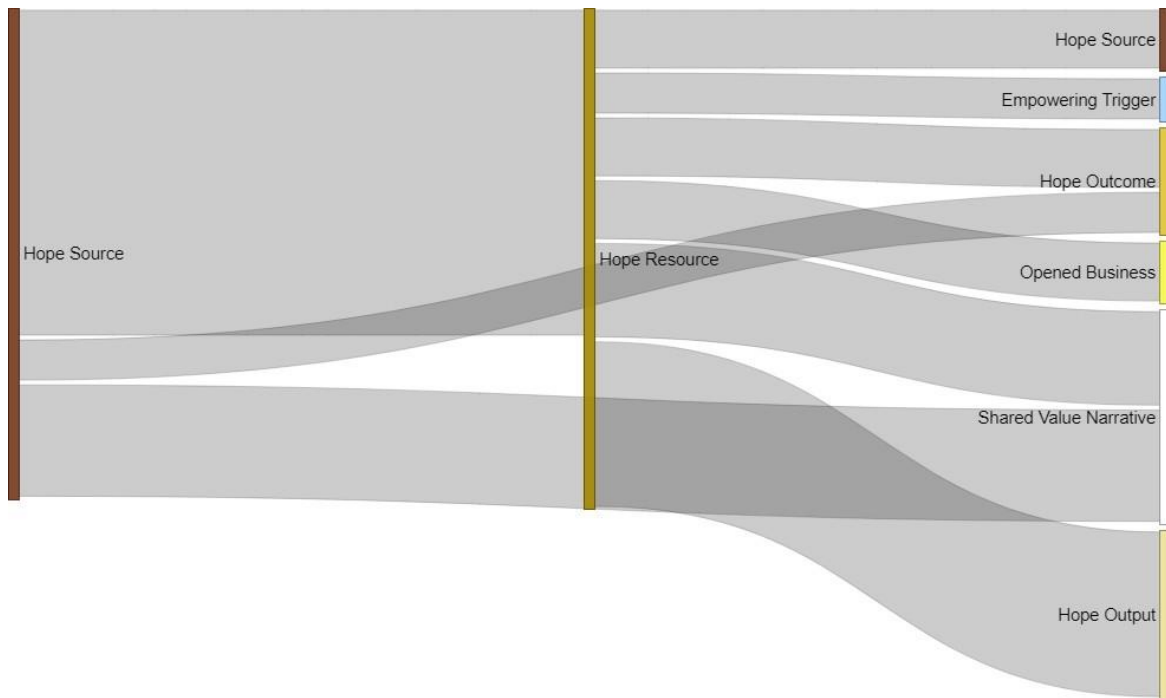


Figure 32: Sources of Emergent Shared Value Creation Narratives

In addition to catalysing actions that empower the entrepreneur to sustain or expand their business, these interactions also represent how entrepreneurs articulate a narrative of shared value creation. A diagram depicting these catalytic interactions and exchanges with sources and resources of hope is summarised in Figure 33 below:



*Figure 33: Catalysts of Business Sustainability and Shared Value Creation in Informal Businesses*

As depicted in Figure 32 and Figure 33 above, transactions that were coded as hope were identified as the main sources and catalysts of an emergent shared value narrative. To elaborate, these transactions were essentially acts of kindness in which the entrepreneur was the recipient. These acts included the receipt of tangible or intangible resources that enabled the entrepreneur to continue with their business.

What presents as an outcome of these processes is performativity, in which creating shared value is performed as emergent from this narrative, producing actions and outcomes. Rather than ‘substance’ or *fait accompli*, shared value performativity can emerge recurrently and accumulatively and is driven by narrative in informal business entrepreneurship (Hernes, 2007; Tsoukas & Chia, 2011). Table 12 is extended in Table 13 below, demonstrating the performativity of shared value creation and its outcomes depicted in informal business entrepreneurship.

Table 14: Shared Value Outcomes as Emergent from Informal Business Entrepreneurs' Narratives

Participant	Narrative	Action	Outcome
2	<i>Hard work and learning narrative</i>	Sought knowledge to specialise and expand business	Expanded to address a need in the community
3	<i>Resilience narrative</i>	Added products to sell	Adapting business offerings to customer needs
4	<i>Resilience and resourcefulness narrative</i>	Adopted an idea from a competitor	Self-employment provides for family
10	<i>Hard work and determination narrative</i>	Additional businesses	Localised job creation
11	<i>Knowledge sharing narrative</i>	Asked another business owner to teach	Adapted business offering to customer needs
13	<i>Empowering others narrative</i>	Asked friends to join the business	Localised job creation

From an empirical standpoint, these findings suggest that shared value creation has cumulative potential, that when an entrepreneur is a recipient of acts of kindness, a narrative of value emerges in which they are inspired to be bestowers of kindness. From the theoretical standpoint of process-praxeology, the findings foreground how shared value is vested in the lived experience of entrepreneurs, emergent from the ongoing process of transactions of kindness that unfolds over time. In the socially embedded context of informal entrepreneurs, each kindness transaction reinforces this narrative, dispersing economic and social value throughout the local context.

These findings align with Pragmatism's disposition of "self-reflexive progression", in which actions and conversation are performative. These performativities are also temporal in that they are both influencing and being influenced by the lived experience (Lindberg & Walter, 2013; Simpson & den Hond, 2022: 134). In studying informal entrepreneurs' lived experiences and life histories, the underlying performativity of creating shared value is revealed. Despite its lack of intent, shared value creation is enacted. As articulated by Barad (2007), this performative understanding "takes account of the fact that knowing does not come from standing at a distance and representing but rather from a direct material engagement with the world" (p.49). A practice of knowing that is arguably absent in the corporate enactment of shared value creation. Collectively and accumulatively, these transactions shape a social context of shared value creation that becomes embedded within a local area as a social norm, independent of a singular business, becoming a systemic quality of the informal business ecosystem.

Shared value creation within informal businesses is therefore performatively and relationally driven, influenced by transactions of kindness within the entrepreneur’s social network, rather than being imposed from external influences or independently sourced (Helin et al., 2014; Packendorff et al., 2014; Weick, 1979). Informal entrepreneurs enact within their local contexts, interact with their social capital networks and harness resources available to create or express an intention to create shared value. Their actions and narratives reflect a desire to create shared value, contributing to their networks or community. By embracing the agency of various actants and leveraging their interactions, informal entrepreneurs catalyse shared value creation with transformative and reciprocal potential.

#### 4.7.4 THE COLLECTIVE, DYNAMIC ACTION NET OF INFORMAL BUSINESSES CREATING SHARED VALUE

The analysis then followed the recommendations of Cloutier and Langley (2016), Gehman et al., (2018), Langley (1999), Langley and Tsoukas (2016), and Pauwels (2011) to construct a visual representation of the analytical themes emergent from the data. The individual informal business action nets were collated to identify collective themes (Cavanagh, 2015; Czarniawska, 2017; Lindberg & Czarniawska, 2006). The analysis attempted to knit an action net as recommended by Dembek (2020), Lindberg and Czarniawska (2006), Lindberg and Walter (2013), and Song and Van Osch (2015), which reveals an ongoing action net of exchange entwined within a socio-material context, both informing and being informed by organising interactions as constitutive of lived experience, behaviour, and narrative.

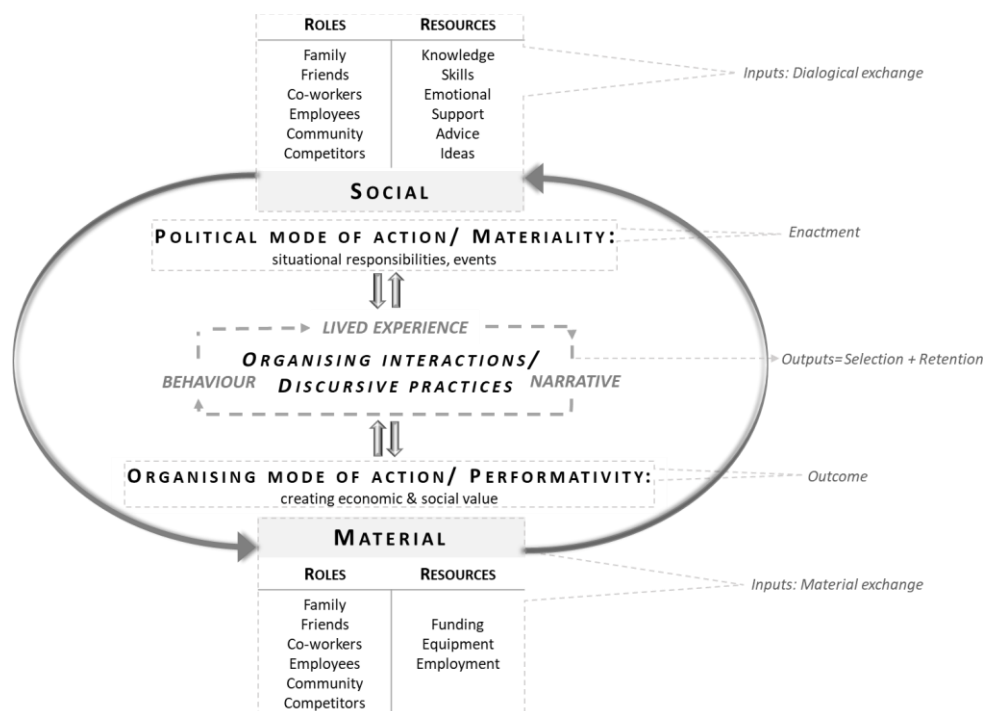


Figure 34: Representation of an Informal Business Action Net: Shared Value Creation as an Outcome

In the context of the informal business action net, materiality and performatively shape the actions and lived experiences of entrepreneurs. Materiality refers to the political mode of action which includes the institutions that shape how entrepreneurs interpret their enactments (Cavanagh, 2015; Hernes et al., 2021; Hultin, 2019). These include family institutions that temporally construct their identity and narratives. Materiality includes the socio-cultural dynamics that shape the context of the entrepreneur and influence how they interpret their environment and actions. Performativity refers to the organising mode of action and includes the actions and behaviours that emerge from the lived experience of the entrepreneur (Carton, 2020; Fouweather & Bosma, 2021; Morlacchi, 2021). These actions are not reactive, but performative in that they shape the entrepreneur's lived experience, behaviours, and narratives. The concept of performativity encompasses the ongoing nature of action, in which actions, behaviours and narratives are not predetermined but become with and through enactment (Ligonie, 2018; Simpson et al., 2021).

Within the socio-material context of the informal business action net, transactions with social actors within the entrepreneur's network, whether resulting in a tangible (material) or intangible (dialogical) exchange, serve as inputs that shape the socio-material context of informal business entrepreneurs. These transactions both influence the narrative of shared value creation, enactment with the external environment and the acts (behaviour) of the entrepreneur. The enactment and shared value narrative create a feedback loop in which certain acts and narratives are selected and then retained. These outputs shape and are shaped by future enactments and inform and are informed by performativities of shared value creation. Within the action net of informal entrepreneurship, shared value creation, therefore, emerges as a performative outcome of socio-material inputs and enactments.

Articulating the action net using process-praxeology, the lived experience of the entrepreneur is foregrounded as a continuous process which encompasses the organising interactions of enactment, selection, and retention. The environment within this framework is not static but continuously co-evolving with the entrepreneur, collectively constructing a socio-material context in which shared value creation and reciprocity become established as narratives and norms. The entwined nature of the relationship between entrepreneur and environment means that any interpretations derived from enactment become embedded in the lived experience of the entrepreneur. These enactment interpretations, in turn, shape and are shaped by the selected behaviours and retained narratives of the entrepreneur, which then collectively shape and are shaped by past and future enactments.

The organising interactions materialise as changes within the business or produce outputs which enable or constrain the business. These collective transactions intra-act to create value in which entrepreneurs produce economic value as subsistence and social value by extending value to their networks of social capital. The actions taken to create shared value reinforce the retained narratives of the entrepreneur,

influencing which future actions are selected and how future enactments are interpreted. This continuous process of organising and complex entwinement with context highlights the performative and relational nature of informal entrepreneurship (Hernes, 2007; Weick, 1979).

The context is inclusive of human and non-human actors, such as technologies, environments, communities and individuals' intra-acts to produce organising in a way that empowers all actants to guide the formation of their socio-material context (Barad, 2007; Helin et al., 2014; Weick, 1979). This perspective recognises the agency of various actants and prioritises the collective and continuous formation of shared value creation in the context of informal business entrepreneurs. Shared value creation, therefore, emerges as a performative outcome of socio-material inputs, organising interactions and the continuous co-evolution of the entrepreneur's lived experience entwined with context. The narratives and norms of shared value creation are shaped and reinforced through lived experience encompassed as ongoing enacted behaviours and retained narratives, influencing future behaviours, enacted interpretations, and narratives. The dynamically entwined nature of informal business entrepreneurship operates within an intra-active socio-material context, which creates and recreates shared value within local clusters. By considering both materiality and performativity, the co-evolutionary nature of informal entrepreneurs is given precedence, recognising the entwinement of context and agency.

#### 4.8 CONCLUSION

Guided by the theoretical framework of process-praxeology, this chapter presented a study of shared value creation in the context of informal entrepreneurs. The framework draws on theories of process organisation studies, pragmatist philosophy and agential realism, which have ontological, epistemological, and ethical implications. The framework positions ontology, epistemology, and ethics as entangled and infused with agency. In which the organisation, the environment and the self are collectively and ethically entwined and mutually become. The framework asserts that the lived experience encompasses these collectives and is mutually constituted, and by studying the lived experience, one can gain insights into these agentic entanglements. This framework inspired the study of shared value creation in the diffractive context of informal entrepreneurship to test these assertions.

This chapter presents the study of creating shared value in the informal sector, giving primacy to process, actions, and experience. By enabling the phenomenon to emerge relationally rather than being prescribed representationally, it reveals that shared value creation emerges as an outcome of economic activity in the informal sector.

The localised nature of informal economic activity localises transactional exchanges of an economic and social nature, clustering resources that promote localised development. Informal businesses operate within localised value chains and are responsive to the needs of customers within their immediate environment, catering products and services to low-income markets. These businesses generate sustainable sources of income for the owners, thereby eliminating their need to seek employment. They also employ and transfer skills to members within the local community, thus contributing to local cluster development. These socially embedded, entwined organisations have strong networks of social capital that collectively shape and are shaped by the socio-material context within which they co-exist. The findings highlight the reciprocal and transformative nature of shared value creation within informal business contexts which create causal loops which emerge from experiential acts of kindness. However, this implicates the owner as the driver of shared value creation within the organisation, derived from their lived experience, values, and narratives. Strong networks of social capital serve as catalysts for localised shared value creation but constrain its effects to localised contexts. Ultimately, informal businesses have the potential to be leverage points within an evolving ecosystem of shared value creation. The following section presents insights gained from prioritising the study of experience, actions and agency as positioned in the theoretical framework of process-praxeology and considers the implications of what these insights mean for the processual concept of an unbound organisation, the implications on shared value creation and how these insights contribute to the agenda of critical organisational scholarship.

#### 4.8.1 IMPLICATIONS OF AN UNBOUND ORGANISATION

As unbound organisations, informal businesses demonstrate how this enables adaptive capabilities to be responsive to environmental changes. These adaptive capabilities are revealed in their responsiveness to customer needs, in which they demonstrate more agility in mitigating external risks. Their unbound nature enables a continuous osmosis between the internalities and externalities of their business and their local community. What this reveals is that the implications of an unbound organisation have the potential to enable shared value creation but also enhance the dynamic capabilities of the business in being able to sense environmental changes, seize potential opportunities in these changes and reconfigure their resources to best mobilise these opportunities (Teece, 2007).

The analysis shows how resource-constrained contexts that have been diffracted in the study of shared value creation reveal how an unbound organisation becomes a strategy to accelerate resource exchange. It does this by lifting the artificial boundaries between the organisation and the local community, thereby opening opportunities for constant transactions of both tangible and intangible resources.

#### *4.8.1.1 Dissolving Dichotomies with Intra-Action*

One of the fundamental concepts of process theory upon which process-praxeology is based is the objective of dissolving dualisms. Previous studies in shared value creation have exacerbated dualisms, which have led to recurring tensions between the organisation and society and economic and social value (Castro-Martinez & Jackson, 2015; Crane et al., 2014; Florin & Schmidt, 2011; Høvring, 2017; Ollivier De Leth et al., 2022; Saenz, 2019). Influenced by agential realism, this study employed a diffractive methodology which both the context of the study and how the data was analysed (Barad, 2007, 2014; Barla, 2021; Murriss & Bozalek, 2019; Taguchi, 2012; Visser & Davies, 2021). As such, an action net and narrative analysis was employed to understand the contextual entanglement of shared value creation in informal entrepreneurship (Cloutier & Langley, 2016; Czarniawska, 2004, 2011a; Lambotte & Meunier, 2013).

In conceptualising the informal business organisation, the informal entrepreneur as an organisational actor and the environment as co-constituted, the study shows the collective constitution of value and how it is created and shared beyond the boundaries of the organisation. It shows how social context and capital informs and is informed by entrepreneurial actions and how a collective of reciprocal transactions continually becomes the business. In terms of shared value creation, the study shows how shared value is a process that evolves through reciprocity and dissolution of intention. The study illuminates shared value creation's performative and relational aspects, as co-created and emergent from continuous performative interactions between lived experience and socio-material contexts. The study advances understanding of shared value creation as an ongoing, dynamic process, influencing and influenced by a multitude of entangled actants. Shared value creation is found to be a collective, enacted phenomenon, sustained and expanded by transactional relationships. The study sheds light on the intricate relationships and interdependencies involved in the creation of shared value.

Process-praxeology advances an understanding of shared value creation as a performative, relational and emergent entwined process collectively constituted by various actants. This theoretical framework contributes to resolving the tensions that have emerged in the shared value creation literature by highlighting the entangled nature of this concept within the socio-material context of informal business entrepreneurship. This empowers all actors to guide the formation of the socio-material context, what the organisation becomes, who acts upon it, interact and whom it acts upon (Helin et al., 2014; Packendorff et al., 2014; Weick, 1979). This shifts the responsibility of social needs to the collective, of both public and private organisations, as both the cause and resolution to pressing social issues (Blowfield, 2012). An entwined organisation does not distinguish between social and economic value but value as inclusive.

The analysis reveals the potential social impact of unbound organisations as being invested in the collective. Lifting the barriers of boundaries creates opportunities for collective efforts from multiple organisations to converge. When this occurs at the collective level, there is potential for transforming systemic change. Transcending the boundaries between firms and between the firm and society enables entwinedness to become a systemic quality of an organisational ecosystem.

#### 4.8.2 IMPLICATIONS FOR CREATING SHARED VALUE

The analysis highlights the reciprocal nature of shared value creation in how recipients of mutually beneficial interactions were likely to act in ways that promoted shared value with actors in their local communities. Shared value is also continuously circulated within the social network of the entrepreneur, representing how shared value is created and operates processually. The study also shows that shared value is not restricted to tangible exchanges of value but intangible value exchanges. This is evidenced in the study demonstrated by the entrepreneurs through the exchange of knowledge, skills, and even emotional support.

##### *4.8.2.1 Implications for Shared Value Practice*

By employing a diffractive methodology and studying phenomena in diffractive contexts, this study reveals implications for practitioners. The analysis positions informal businesses as catalytic leverage points for scaling shared value. If formal businesses invest in informal businesses, their growth would spill over to their local communities in clusters. For formal businesses, this could be an opportunity to enhance trust within these communities and improve their metrics of sustainability through enterprise development. In addition, these social networks could provide a rich source of stakeholder engagement to inform the development of new products and services for these markets. Opening opportunities in these market segments, which are predominant in emerging economy contexts.

The study shows how shared value creation can be personal and how it is integrated with lived experience. It implicates the lived experience and role of organisational leaders or owners in effectively driving shared value creation. This suggests shared value that is leader-driven and highlights the importance of having the right people to continue its impact when it comes to larger organisations.

The narrative of shared value creation is shown to be deeply personal, reinforced by the behaviours, values, and narratives of the owner and their perceived role of business in society. As such, shared value creation should only be incorporated within formal sustainability frameworks if it speaks to the personal values of the organisation's leadership. However, ultimately, it should be envisioned as values that underpin corporate strategy and practice.

#### 4.8.3 IMPLICATIONS FOR CRITICAL ORGANISATIONAL SCHOLARSHIP

These implications are informed by the novel insights generated from diffractive contexts. Contexts previously overlooked in the study of organisations can advance understanding and resolve some of the issues that emerge from conventional contexts. The analysis in this study contributes to the role of narratives in the study of shared value creation. Narratives play an influential role in how organisations respond to equivocality and how this influences future responses. Therefore, by taking a critical approach, new insights emerge regarding the relevance of promoting empowering narratives that could be established at the collective level in response to equivocality.

In addition, by implicating the researcher with ethical accountability, the critical approach of process-praxeology helps the researcher to be cognisant of the discursive practices employed that have selected what comes to matter and what narratives persist within the study of shared value creation. By viewing research as entangled with society, we can respond to social issues, ensure dissemination for social engagement, potentially enhancing research impact. The study also informs the value of insights illuminated by adopting co-creative, participatory, and context-specific studies in enabling a rich and deep understanding of organisational phenomena. However, both theoretical and practical implications are not absolved of limitations.

#### 4.8.4 LIMITATIONS AND WAY FORWARD

The study presented an analysis of contextual data using the entrepreneurial stories produced during digital story workshops. The stories were not entirely open-ended but shaped by the research question, workshop tools and story structure, which imposes upon what the storyteller selected to reveal. The stories were also limited to five hundred words to produce the audio-visual output of the digital story, and all participants were selected from a particular geographical area of the study. These constraints present limitations which could inform future research. Using a methodology that is not limited to the constraints of a digital story, future research could employ an open-ended lived experience interview in which the entrepreneur shares their business journey unrestricted by the word or story structure limitations. The context of this study was limited to the peri-urban area in Kwa-Zulu Natal, South Africa. Therefore, future research could explore contexts in other geographical locations as well as from areas that are predominantly rural or urban to advance an understanding of the contextual dynamics of shared value creation.

Even though the study is supported by quantitative findings, the study predominantly used qualitative data and analysis techniques to inform an understanding of shared value creation in informal

entrepreneurship. The study is, therefore, subject to the limitations of qualitative research in terms of generalisability, subjectivity, and bias. However, the study aimed to present a rich understanding that aims towards generalisability and scientific rigour through multiple cross-case analyses (Brown & Eisenhardt, 2006; Eisenhardt, 1989; Eisenhardt & Martin, 2000; Gehman et al., 2018). The study used story scripts from two workshops that took place in 2019 and 2021 and did not involve the same participants. The study, therefore, lacks a longitudinal understanding, which future research could address to understand the evolutionary process of shared value creation. It would be valuable to use repetitive participants to understand the change in their businesses over time and its implications for creating shared value.

Even though the study provides rich insights into how shared value is created in unbound organisations within resource-constrained contexts, what remains to be understood is how shared value creation converges at the collective level. This conclusion led to the empirical study presented in the next chapter.

# CHAPTER 5: DISENTANGLING THE ESSENCE OF CREATING SHARED VALUE

*“Unless someone like you cares a whole awful lot, nothing is going to get better, it’s not”*

Dr. Seuss

## 5.1 INTRODUCTION

Cross-sectoral partnerships often emerge in response to complex issues that are less effectively tackled by a single organisation or sector. In the context of shared value creation, cross-sectoral partnerships infer new ways of organising that transcend organisational boundaries and seek to address the remaining questions raised in the previous chapter. Although previous studies have investigated new forms of organising that enable the creation of shared value, these have prioritised business model hybridity. Interactions across sectors tend to emerge largely within the context of stakeholder engagement rather than as a catalyst for Creating Shared Value (CSV). This chapter explores the experiences of twenty individuals with a collective interest in a cross-sectoral partnership between two corporates and a non-profit organisation aimed at creating shared value. Interviews and observations were analysed according to the principles of phenomenology. The results of the study reveal shared value creation as a co-creative learning process that emerges both individually and collectively as the lived and living philosophy of participants. Drawing on the framework of process-praxeology (Chapter 3), this chapter uncovers the ontological, epistemological, and ethical implications of creating shared value in the collective becoming of cross-sectoral partnerships.

When Porter and Kramer (2011) argued that capitalism was under siege, it is suggested that they were referring not only to the narrow capitalist definition of value but also to how this system has framed the boundaries between business and society. The problem they address is that capitalist conceptions of value distinguish business from society and, thereby, economic from social value. CSV aims to reset the boundaries of capitalism by connecting firm success with societal improvement and opening new ways of organising beyond the boundaries of the firm (Lee et al., 2012). While the conceptual intent of CSV embodies narratives of co-creation, co-innovation, and cooperation, studies have tended to frame CSV within the context of competition and sustainability, misaligning this intent with how it has been interpreted and organised in the extant literature (Berti & Mulligan, 2016; Lee et al., 2012; Porter & Kramer, 2011; Strand & Freeman, 2015). Consequently, CSV becomes reified as a product, a distinct artefact, capitalised and distributed in the business and community, which has caused dualistic tensions to emerge between economic and social value and business and society (Blowfield, 2012; Castro-Martinez & Jackson, 2015; Dembek et al., 2016; Jose, 2016; McIntosh et al., 2016; Moon & Parc, 2019;

Saenz, 2019).

To realign conceptual intent with practice, this chapter proposes a reimagination of creating shared value as a co-creative process, which envisions an integrative, intra-active business and society (Berti & Mulligan, 2016; Lee et al., 2012; Strand & Freeman, 2015). Reimagining CSV as a co-creative process catalyses value creation beyond traditional survival and profit to value entwinement in systems of human needs (Dembek et al., 2016). This reimagination enables solutions to emerge that involve multiple actors to achieve shared goals integrated with sustainable local development (Berti & Mulligan, 2016). Cross-sectoral partnerships are one avenue to harness shared value as a co-creative process. Creating Shared Value (CSV) through cross-sectoral partnerships establishes that collaboration between different organisations, from diverse sectors are collectively empowered to mutually create economic value while addressing societal challenges. In this context, rather than sharing existing value, added value is created by leveraging a diversity of resources and stakeholders through the partnership (Saenz, 2019). The symbiotic nature of cross-sectoral interactions enables value creation and exchange within the microcosm of the partnership, which includes resources and skills enabling co-learning to emerge (Strand & Freeman, 2015).

Cross-sectoral partnerships infer new ways of organising to create shared value (Berti & Mulligan, 2016). These partnerships interact as “human ecosystems where trust, relationships, intrinsic motivations and social capital are fundamental” to achieve value-added participation (Alberti & Belfanti, 2019; Mion & Beghini, 2020: 7). The exchange of both tangible and intangible resources is mobilised within the partnership (Azmat et al., 2015). In Mirvis et al. (2016), the authors present how knowledge emerges and is exchanged, often in situ, during empathic partnership interactions; their study found that this applies to both tacit and explicit knowledge. Expanding decision-making beyond the firm and engaging a broader group of stakeholders enable expanded value creation through cooperative decision-making (Saenz, 2019). These have been shown to extend beyond profit and non-profit, private, and public-sector boundaries, even boundaries between competitors (Strand & Freeman, 2015). This situates cross-sectoral partnerships as the appropriate context to study the phenomenon of CSV.

In what follows, the chapter presents a reimagination of CSV informed by process-praxeology and introduces phenomenological and diffractive analysis as the appropriate approach to explore this phenomenon. The chapter presents the context of the partnership and the findings of the participant experiences to uncover the research question of how collective organisations converge through partnership to create shared value beyond organisational boundaries. The chapter concludes with an analysis of the emergent themes of participant experiences and discusses these findings, considering the wider literature and broader implications.

## 5.2 REIMAGINING CSV AS A CO-CREATIVE LEARNING PROCESS

The reimagination of shared value creation is inspired by Barad's (2007) agential realist account of phenomena. Barad's insights into phenomena present an opportunity for CSV to be reimagined as a co-creative learning process that emerges from the interactions between its stakeholders. How so? Well, Barad (2007), a quantum physicist, likens phenomena to atoms, the smallest unit that constitutes reality. These atoms (phenomena) are relational in nature, meaning that they emerge into our perceptible existence through and with our and nature's interaction with them. This implies that both nature and our human selves have agency as we interact with phenomena that enable their emergence. As such, phenomena are not abstract concepts that we engage with intellectually to understand but encompass tangible and intangible actions and practices that define our experiences.

For Barad (2007), agency, therefore, is not a fixed attribute but an ongoing process that constitutes the shaping and reshaping of our world. Agency, in the sense of Barad (2007), is at the heart of how reality evolves, in which the phenomena come into being through constant interactions. In the context of creating shared value, its stakeholders, which include the environment, partners, contributors, and beneficiaries, collectively co-create its emergence into the perceptible reality. And this is the interesting part, Barad (2007) implicates us as researchers within this collective co-creation. She argues that when we study phenomena, we become inseparable from them, also contributing to their realisation. This realisation was profound for me because reimagining CSV in agential realist terms implies that it does not exist as a phenomenon separate from the experience of its stakeholders, which includes my experience. This means that in my study of CSV, I have an agency that assigns me ethical responsibility in how and what I choose to perceive and how and what I communicate about the phenomenon to a wider audience.

These practices and actions, driven by multiple actors, converge through interaction to form complex patterns that constitute phenomena. Actions and practices are material and discursive (tangible and intangible), and Barad (2007) interestingly argues that not only do they construct our perceptible reality but constitute the boundaries and properties of this reality. In this sense, all stakeholders are assigned ethical responsibility when we consider our role in how we contribute to these properties and what we are bound to. It is through this process that in each stakeholder's experience of the phenomena, we allow some of reality to be perceptible and other parts not. We are each empowered with agency that enables certain meanings to be assigned that determines what 'matters' and what is differential in their 'mattering' (Barad, 2007). "This ongoing flow of agency through which part of the world makes itself differentially intelligible to another part of the world and through which causal structures are stabilized and destabilised does not take place in space and time but happens in the making of spacetime itself" (Barad, 2007: 140).

What does this mean? It means that our “practices, doings and actions” matter (Barad, 2007: 135). It matters as the relational atoms of what constitutes matter. Imbued with agency and action, creating shared value becomes performative, which insists that in “understanding, thinking, observing and theorising” CSV, we consider these as “practices of engagement with, and as part of the world in which we have our being” (Barad, 2007: 133). As such, CSV emerges from, rather than precedes, these intra-active practices of engagement and leads us to question what we have excluded and what we have permitted to be included in our experience in this materialisation of shared value creation.

Reimagining CSV as an agential realist phenomenon opens new avenues for exploring its materialisation, emphasising the interconnectedness of diverse elements and practices that shape its emergence (Barad, 2007). It encourages a shift away from static conceptions towards a nuanced appreciation of the ongoing processes that contribute to the co-creation of shared value. It underscores the dynamic nature of this phenomenon, emerging from the interplay of actions, interactions, and practices. Barad's (2007) ideas encourage us to look beyond static definitions and instead appreciate the intricate web of relationships that give rise to shared value creation. As Barad (2007) says, considering experience as an intra-active phenomenon:

*“makes it possible to take the empirical world seriously once again in the construction and testing of theories, but this time with the understanding that the objective reference is phenomena, not the ‘immediate givenness’ of the world”* (Barad, 2007: 514).

In this way, we can begin to articulate how social and discursive forces come to matter and recognise the effects of these forces on lived experiences. Within this context, CSV becomes aligned with purpose, action, and interaction rather than with a bounded territory or location, asserting that the study of CSV is realised as a connection of common human experiences accessible through dialogue in the continuous process of organising (Bakken & Hernes, 2006; Tsoukas, 2017).

As a relational, co-creative process, creating shared value becomes disconnected from financial indicators and transitions from linear models of evaluation towards ecosystemic needs and progress. In this reimagination, creating shared value then becomes prioritised with purpose, action, and interaction rather than with a bounded territory or location. While there is no roadmap or blueprint to CSV, due to the uniqueness of each business and society, adopting a learning-focussed approach fosters an enabling environment for collaborative co-creation with partners (Castro-Martinez & Jackson, 2015; Inkpen & Currall, 2004; Mirvis et al., 2016; Wenger, 2016). The synthesis from these scholarly inputs suggests that CSV more fruitfully serves its conceptual intent when prioritising innovation, learning and collective engagements. Thus, reimagining CSV as an agential realist phenomenon offers a way forward in which to study CSV as an intra-active ongoing performance, where knowing the phenomena emerges

from lived experience as an entwinement of intellect, action, reflection, and embodiment (Barad, 2007; Gill, 2014; Sandberg & Dall’Alba, 2009; Tsoukas, 2005; Weick, 1979).

### 5.3 ALIGNING THIS REIMAGINATION IN PRACTICE

To inform an empirical study of CSV conceptually and methodologically in how shared value creation emerges and becomes an agential realist phenomenon, this chapter adopts the theoretical lens of process-praxeology (see Chapter 3). This lens expands praxis to include material-discursive practices and reimagines praxis with transformative potential as intra-active action not only upon but within a processual world (Barad, 2007; Dewey, 1929a, 1938a; Freire, 2005). To investigate praxis requires an investigation of intra-actors’ comprehension of their lived reality and their action upon and within it, which Freire (2005) asserts is most suited to a co-creative, reflective methodology. Therefore, process-praxeology situates the knowing of organisational phenomena in the lived and living experience of organisational actors contextualised within a lived and living organisation as a way of knowing the world from within and as a part of (Barad, 2007; Dewey 1929a, 1938a; Dewey & Bentley, 1949). In this world, praxis, agents of praxis (both human and non-human), and the world itself are continuously and iteratively entangled and constituted.

The intention of process-praxeology is to contribute to ethically invested knowing and known outcomes derived from ethically-driven inquiry (Barad, 2007; Dewey, 1938b; Dewey & Bentley, 1949). As a scholar informed by this ethico-onto-epistemology, I have responsively shifted my inquiry of CSV to the experiencers of the phenomena while remaining conscious of the broader contextual intra-actions from which these experiences have emerged, as a means to contribute to outcomes that have practical, real-world resonance. As a process-praxeologist, I embark on knowing organising phenomena through the lived and living experience of human agents located in an intra-active context while remaining accountable to the boundaries and attributes my knowing processes enable or constrain (Figure 35).

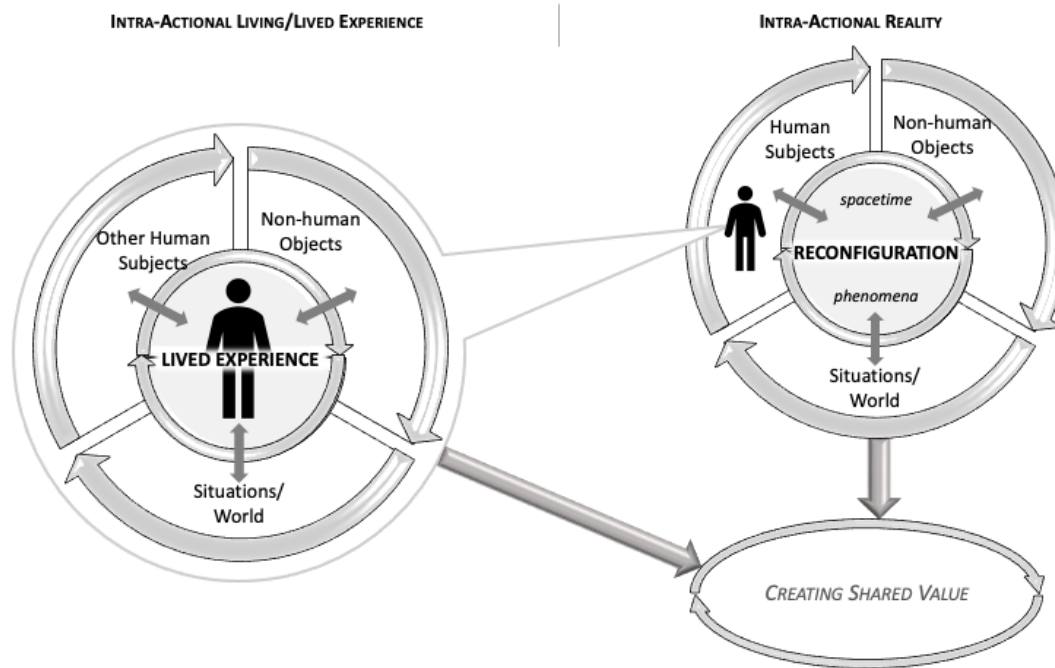


Figure 35: Study of Creating Shared Value as an Agential Realist Phenomenon in Process-Praxeology

In approaching the study of lived and living experiences of CSV, both self and scientific inquiry become mutually entangled processes. Rather than seeking to understand materialisation in the form of entities, process-praxeology encourages an understanding of materialisation as material-discursive practices that enact and ascribe meaning to and with CSV (Hultin & Introna, 2019). It is, therefore, suggestive of adopting a material phenomenological approach for the empirical study of CSV (Orlikowski & Scott, 2015).

#### 5.4 METHODOLOGY

This study adopts a material phenomenological approach, drawing inspiration from the work of scholars such as Orlikowski and Scott (2015) and McGregor (2020). Material phenomenology offers a unique lens through which to investigate the lived experiences of stakeholders in the context of shared value creation. This approach allows for a comprehensive exploration of how both material and non-material entities, including human and non-human actors, interact and shape the phenomenon under investigation. Central to this approach is the recognition that experience is not solely based on human subjectivity but emerges as a result of complex intra-actions within a trans-corporeal landscape (McGregor, 2020). By attending to the entanglements of material-discursive practices, the study aims to uncover the multifaceted nature of shared value creation and its impact on various actors involved.

The methodology involved conducting 20 semi-structured in-depth interviews with stakeholders who have been actively engaged in a shared value creation partnership. These interviews serve as a means

to access and understand the intricate interplay between human participants, material artefacts, sociocultural structures, and the broader environment. By delving into the experiences of these stakeholders, the study seeks to articulate the dynamic relationships and patterns that contribute to the emergence of shared value. To guide the analysis, the study draws from the principles of material phenomenology as proposed by Henry (2008) and articulated by McGregor (2020) in the context of agential realism. Michel Henry, a French philosopher, distinguished his “Material Phenomenology” from Husserl’s concept of “Hyletic Phenomenology”. While hyletic phenomenology seeks to uncover the essential structures or material manifestations that underlie human experience, material phenomenology considers these material manifestations as entangled with human experience (Henry, 2008).

While Husserl’s concept considers how the socio-material constitutes the nature of phenomena and how these are revealed in the human experience, Henry positions that material-discursive practices not only constitute but create the phenomena through human experience (Hardy, 1999; Henry, 2008; Williford, 2013). This includes a focus on the entanglement of material and discursive forces and their co-constitutive role in shaping human subjectivity and experiences. This entanglement of matter and meaning extends phenomenology to understand the essence of meaning and how these essences constitute matter. Additionally, the study acknowledges the ethical implications of such entanglements, emphasising a research approach that is collaborative and relational, conducted not on participants but with them.

Data analysis involves a thematic exploration of the interview transcripts, aiming to identify recurring patterns, emergent themes, and variations in stakeholders' accounts. The study is attentive to the differential themes that shed light on the diverse aspects of shared value creation and its material-discursive underpinnings. By adopting a material phenomenological approach, this study contributes to a nuanced understanding of shared value creation by going beyond traditional human-centric perspectives (Henry, 2008; McGregor, 2020). It provides insights into the complex dynamics between materiality, human agency, and sociocultural structures. It offers a means to explore the intricacies of the phenomenon in a holistic and contextually embedded manner. Ultimately, this methodology allows for a deeper exploration of how shared value creation unfolds as a multifaceted and interdependent process and provides a framework for examining the intricate interplay between human perception and the material world to understand how experiences are entwined with both the material and discursive manifestation of creating shared value (Barad, 2007; McGregor, 2020: 514).

## 5.5 PARTICIPANTS (STAKEHOLDERS) AND DATA COLLECTION

In selecting participants for the study, first, a cross-sectoral partnership was identified. To align with the study of CSV, the partnership needed to include both corporate and non-profit partners, and a key and collective objective was to create both economic and social value. In identifying a case study, first, various corporations operating in South Africa were reviewed that articulated CSV as one of their values. The various projects in which these corporates were involved were reviewed, and projects that involved non-profit partners were extracted as potential case studies. Various corporates were then contacted to determine their interest in the study. Upon affirming interest, the partners were contacted, and the case study was selected upon their mutual consent. To explore the emergence of CSV within the context of the cross-sectoral partnership empirically, a small sample was selected as recommended by Gill (2014), but the interest and willingness of participants to speak to me enabled this sample size to be expanded to the point of saturation (Creswell, 2009; Davies & Riach, 2019; Gehman et al., 2018; Jarzabkowski et al., 2016).

The final empirical study comprised 19 participants, with a total of 18 semi-structured interviews conducted. Interviews ranged from 20 to 120 minutes in length, of which 10 were conducted over video conferencing software, and 9 constituted face-to-face, in-person interviews at the project site. Data collection began in December 2021 and concluded in December 2022. During and after some of the interviews, participants sent documentation that they referenced during the discussion. This added to resources used in the analysis and provided support in improving the trustworthiness of the study (Creswell, 2009; Miles et al., 2014). The interview design began with the founder of the non-profit to understand its vision, mandate and motivation for emergence. I then proceeded to interview each partner leader who formulated the partnership strategically and operationally. Through these discussions, various participants were recommended who were contacted, in addition to other stakeholders within the partnership. The objective was to gain insight from various lived experiences as a means to disentangle the material-discursive emergence of shared value creation. As such, the participants were categorised according to their affiliated role within the project (see Table 15).

Table 15: Categories of Case Study Participants

<b>Participant Category</b>	<b>Number of participants</b>
NPO founder	1
Partner Leaders	3
Corporate Affiliates	3
Project Implementors	4
Project Contributors	4
Community Stakeholders	4
<b>Total</b>	<b>19</b>

To analyse the empirical material, I drew inspiration from Vos's (2021) systematic pragmatic phenomenological analysis as a guideline, complemented by narrative and diffractive analytical guidelines (Czarniawska, 1998b, 2023; De Fina & Georgakopoulou, 2015; Fox & Alldred, 2021; Pentland, 1999; Taguchi, 2012; Tsoukas & Hatch, 2013). A profile was drafted for each participant interview, which constituted the following components (Vos, 2021):

- 1) Fieldnotes and reflection on overall interview
- 2) Micro-level analysis of interview transcripts
- 3) Description of each micro-level component
- 4) Reflexive account on whether I may have influenced the participant's response.
- 5) Reflection on the relationship between the micro-level components and the initial interview conclusions (items 1 and 3).
- 6) Synthesising the micro-level themes to subthemes
- 7) Synthesising the subthemes into overarching themes
- 8) Reflections on the overarching themes and the lived experience of CSV

The following template was used as an analytical tool integrating these components and enabling cross participant analysis.

Table 16: Coding Template

<b>Interview Component</b>	<b>Component Theme</b>	<b>Reflexivity</b>	<b>Relationship to conclusions</b>	<b>Subtheme</b>	<b>Overarching Theme</b>	<b>Researcher Comments</b>
Code derived from participant's quotation	Section of text from the participant. What is the general theme the participant is expressing in this component?	Role of the researcher in the interview and analysis. E.g. This triggers sadness in me; does this sadness come from me or the participant?	Relationship between this specific component and the overall conclusion that the participant made in the interview. Is there inconsistency?	Categorise component themes into 10-25 subthemes using the participant's words	Categorise subthemes into 5 overarching themes	

The following table represents the number of unique interview components derived from each participant:

Table 17: Interview Components per Participant

<b>Participant</b>	<b>Number of Interview Components</b>
Community Stakeholder_1	10
Community Stakeholder_2	15
Community Stakeholders_3-4	11
Corporate Affiliate_1	9
Corporate Affiliate_2	11
Corporate Affiliate_3	14
NPO founder	41
Partner Leader_1	43
Partner Leader_2	34
Partner Leader_3	34
Project Contributor_1	11
Project Contributor_2	15
Project Contributor_3	17
Project Contributor_4	17
Project Implementor_1	28
Project Implementor_2	23
Project Implementor_3	10
Project Implementor_4	9
<b>Total</b>	<b>352</b>

After the profiles and components of each participant were concluded, the analysis sought to identify subthemes, followed by overarching or cross-cutting themes and narratives. Themes were labelled according to participant phrases and extracted verbatim from the transcripts. These themes and narratives enabled various theoretical implications to emerge. Figure 36 below provides a disaggregation of the subthemes that emerged between participants as well as the number of times each of these subthemes were coded. The figure also provides an indication of the overarching themes under which these subthemes were categorised inductively.

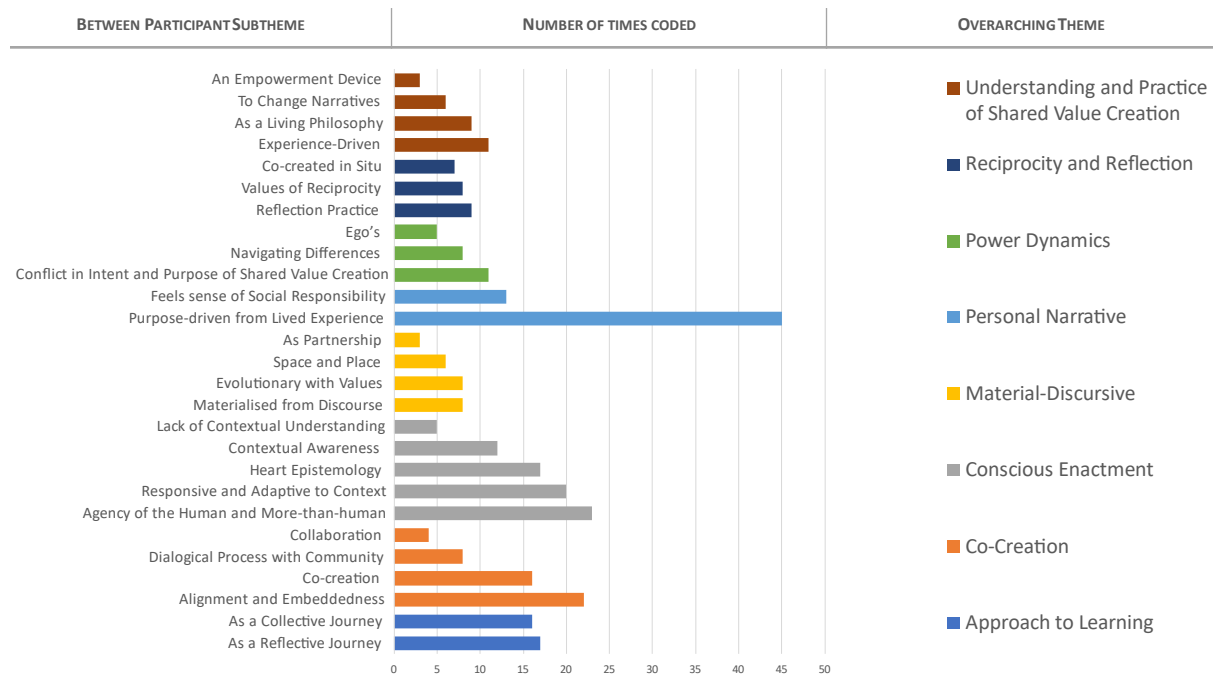


Figure 36: Number of codes per Subtheme and Overarching Theme

The case, themes, narratives, and their analysis are presented and discussed in more detail in the following section.

## 5.6 CONTEXT OF THE STUDY

### 5.6.1 INTRODUCING AFRIGEN<sup>8</sup>: A CROSS-SECTORAL PARTNERSHIP PROJECT

The project under study, which will be referred to as AfriGen, is a farming project based on the principles of regenerative agriculture and permaculture aimed at creating shared value by tackling food security through food donations and empowering local community members to grow their own fresh produce. The project, established in 2019 adopts a long-term approach through education as well as the empowerment of emerging farmers and community members to establish a sustainable food secure

<sup>8</sup> Fictional names are used throughout this chapter

system. One of the objectives of the project is to be self-sustainable by selling excess produce for which proceeds are reinvested into the project. AfriGen is comprised of two corporate partners who contribute both resources in the form of capital and assets, as well as agricultural expertise. The NPO partner acts as the implementor of the project and contributes knowledge resources to the partnership.

The NPO is the main site of the study, located in the Winelands of the Western Cape. Now home to various affluent estates and world-renowned wine producers, has a history of oppressive working conditions for farmworkers of colour. The project site hosts all the amenities and facilities for operationalising the project. Most of the face-to-face interviews were conducted at the site, apart from one which was conducted at the participants' place of work, a member of the local community. The study analysed the interview and observational data collected from the site. It searched for both connections and differential patterns between emergent themes in accordance with the principles of material phenomenology (Gill, 2014, 2015; Henry, 2008; McGregor, 2020; Moran, 2000; Sanders, 1982). The next section presents narratives of the NPO's emergence, the emergence of the cross-sectoral partnership and projects and the collective experiences of CSV of all relevant stakeholders.

## 5.7 FINDINGS

Tracing the source of intention within individuals can lead to remarkable insights into transformative stories and how it has shaped the trajectory of their lives and influenced the world around them. This research delves into a captivating co-created narrative, centred on a co-founder's journey to establish an institute, revealing the underlying phenomenological processes that paved the path for its materialisation. Through phenomenological analysis and inquiry into the creation of shared value, the research illuminates how human and more-than-human agencies converge to materialise an institute and its purpose-driven identity. Interview questions were unstructured, open-ended, and purposed towards the respondent's reflection and lived experience of creating shared value. The interview serves as the primary source of data and provides rich, raw material to phenomenologically describe the participant's reflection on lived experiences, using the metaphor of a golden thread, actions and events were validated by the participant to determine connections and the underlying meanings associated.

### 5.7.1 THE EMERGENCE OF AN INSTITUTE: PERSONAL REFLECTION AND ENGAGEMENT WITH THE FOUNDER

It was a cold and wet day in November, unlike the typically warm and humid weather of the South African summer, when I took the long, anticipated journey to the Winelands. I travelled across the city to meet with the founder of this admirable institute. One that I had been following since the very start

of my academic journey. It just so happened that this institute was situated in a place which had physical and historical beauty that could not be denied but conjured great sadness within me. The Winelands are renowned as colonial establishments, whose architecture is still prevalent. The historical buildings add to its beauty but resonate with pain for many who are familiar with its history. For me, these winelands are representative of the oppression and inequality that afflicted my people, mixed race people, referred to as “coloured” in apartheid South Africa. The journey there reminded me of the dispossession, the forced labour, and the cultural entrapment of the "dop system", which caged a culture to be defined by alcoholism and less-than-human agreeableness. It robbed many of the capacity to dream and visualise a life beyond the confines of a farm, which is imposed on future generations.

Driving there, passing the opulent farms juxtaposed with townships, informal settlements, and rundown farmworker accommodation, reminded me that despite, nearly three decades of democracy, the imprint of the past was so still so powerful. Even though my experience of this era was lived through my parents, my observation of this reality could not be denied. Knowing what I know, I could not unsee it, my vision altered to notice the injustice. This is the narrative that inspired my research, a narrative that I constantly reflected upon throughout the research process to remain objective and permit the authentic lived experience of participants to emerge. The three-quarter of an hour drive, which I had done several times throughout this project, repeatedly gave me the opportunity to reflect on this narrative, with an awareness that imposed on the interview. I saw my role as a facilitator to uncover the participant's narrative, to enable their truth to emerge. Notwithstanding the embedded biases I may have had. What emerged through, was a collective experience in which meaning was co-created, where reflection and introspection entwined through dialogue with unearthed a golden thread that connected my how and why with the participant's recollective experience. I perceived my role as facilitating these golden thread connections.

As I arrived at the gate of the site, I managed to enter with no need to notify my participant, since someone, a resident, or an employee may have opened the gate and entered just as I approached. I pass a sign on a road that fades from tarmac to gravel and call my participant for more directions. I was not adequately prepared for what seemed like a typically rainy winter's day in the heart of November or the rain-melted gravel that collected on my pathway towards the house. With an umbrella, notebook, pen, and phone in hand, I noticed the landmark container that my participant earmarked like an X on a treasure map that would lead me right to where we would meet. They welcomed me at the door which was situated at the top of a short flight of stairs, our first physical encounter since having been in numerous virtual communications over the past few weeks. Their residence? Quaint, almost cottage-

like, notably inspired by a bohemian<sup>9</sup> decor complimentary to their personal attire.

As we sat down, they alerted me to the expectation of a visitor in the course of an hour. As soon as these words landed on my ears, I could feel the unspoken pressure of this time constraint stir up within me, but that quickly passed as soon as we began engaging. I started with the usual academic formalities, ethics, consent, etc. and began articulating the story of my study and what brought me to this moment of dialogue with them. I could see the appreciation of this articulation of background and context, after which I made an effort to communicate the experiential, self-reflective nature of the study, and what could be expected was not the typical question-and-answer academic inquiry, but inquiry fully invested in the unfolding of their lived reality, and the temporally entwined sources and moments that assembled this entangled existence.

This participant's journey began with an identification of a profound energetic pull to a particular location, which converged with their personal desire to leave a lasting legacy for their children while aiding those less fortunate. The interview revealed an individual's pursuit and reflection upon a journey with the more-than-human. The journey unfolds as a material-discursive process in which forces of space, time, and nature intra-act to materialise the phenomenon under study. Through reflection and dialogue, the emergence of two interconnected threads becomes evident – a pre-existing call to leave a legacy and a more-than-human agency resonant in the locations' magnetic pull. Meanings emerged for us each during this exchange. I realised the agentic nature of the more-than-human, a term used by my participant to describe the forces and energy of nature that first pulled them to the geography of this place.

*"I'm taking a bit of time to reply, I'm not sure a calling or a pull here by your navel, I'm not sure it's got many words, you know, it's a visceral thing. It's in the body. And I mean, it was, it was about a place, I felt very much called to this place. That more-than-human world has its own way with us. And so, when a place calls, then the place itself shows what is extraordinary, it always happens, the place, it's got a magnetism, and then the place shows exactly what it is, I'm paying attention. I think that it's rooted in your ancestry in a more-than-human world. That connection with nature and the more-than-human world is the transgressive and transformative learning, that was the thing I was after. That visceral calling that says, Now, I just can't leave that that's the thing, it has to unfold. It's the nature of being has to move it has to unfold."*

That's how my participants articulated the moment that drew them to this place. As we unpacked and

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<sup>9</sup> Bohemian refers to an aesthetic that is free-spirited, artistic and creative. Often reflecting a rejection of social conformity and embracing environmental consciousness.

knitted together this golden thread, I could feel the piecing together of years of intellectual understanding culminating in practice. My own golden thread became clear and connected, all the pieces of this extensive academic puzzle, fusing with me and becoming my new lived experience. There was a moment during this engagement when I knew what I knew had shifted. Although each and every single engagement of inquiry imprinted on this reimagined self, it is this engagement in particular that pieced it all together for me. My participation closed the gaps in my own understanding and the dissatisfaction I experienced in seeking answers. Although answers can never finitely be found, as the process of inquiry continues to unfold, there comes a point in the answering quest where saturation or satisfaction is reached. That moment for me, emerged during this engagement.

In terms of my study of this shared value creation partnership, this interview was meant not only to uncover the origin of this relationship but also the origin of the organisation that initiated it. What motivated my participant to transform a piece of land, nestled between highly contrasting environments, to establish and grow an institute entwined with ecology and purposed to serve the needs of offspring cursed by the legacy of social inequality and injustice?

*"my whole story is about breaking free, so then when we say, oh, how did I start this? Well, it started me. What does it really mean to be free to forgive, to let go, just be absolutely free? And to fall in love again and again, fall in love again and again with the world to be with the earth." Joy. It doesn't mean feeling good all the time. It means feeling all the feelings that are to feel and working with concepts of what it means to be free. And, I think all of us have that voice, the inner unfurling an inner unfurling of the human you were called to be."*

By seeking to unfold the institute's transformation from a neglected past to its vibrant present, together we explored how artistry, space and place played significant roles in shaping its purpose-driven identity. We collectively uncovered the essence of heart epistemology, a concept co-created in our engagement and revealed its profound influence on the creation of shared value, providing insights into the transformative potential of purpose-driven endeavours.

*"I think it's much more the colonization of how we see the world of our epistemologies, of ways of knowing that seemed to suppress the heart, you know, the heart. I just love, love from the heart, just to live in my heart, and to you know to belong and to help people feel that they belong, and to have a sense of freedom."*

The construction of lived experiences and meanings in the interaction between the participant, phenomenon, context and researcher materialised as a journey that characterised serendipity. The participant displayed insight into the agency and connection between the human and more-than-human,

revealed in her understanding of how removing children from their familiar environment could break oppressive DNA that subconsciously impacted their lives.

*"This was the idea. Ways that breaking patterns of domination, learning inside your own zone, in a little community, you will be a different person. The listening, bearing witness, being heard, sometimes for the first time ever, something changes. And when we're listened to, we become different. Then the funding and all of that sort of details and that just unfolded. The tiny little things that knitted up this place. As if there was this grand plan, there wasn't, it was a mess, it was always a mess. But it's invisible work. I'm much more interested in what's invisible, than what is immediately manifested. That has always been the dream. I think it's only manifesting properly now."*

The analogy of the golden thread encapsulated the essence of this engagement, connecting the purpose of the interview to authenticity and intention.

*"But there's like this collective of golden thread that kind of ties together. Yes. To let this place exist. I think I'm good at joining dots and seeing connections, you know, just follow the golden threads. Especially the golden threads that are mysterious, and that are nuanced and that are oblique. And that you can't see easily."*

In a moment of clarity, the participant expressed their purpose as leaving a legacy that reconciled their historical privilege, on a small scale but one that could be remembered by their children.

*"if I put words to it, I think I wanted my children to grow up knowing that in a post-apartheid country, I did something, doesn't matter what it looked like, I had no idea what it was going to look like, but I knew that in a post-apartheid South Africa, I knew that my children would be able to say, our families have got that values, you know, we did that. And that I wouldn't care at all when people you know, in 100 years, people will never remember our names, but they might look at this valley and say, Oh, those guys did something different."*

Amidst this exchange, the participant articulated their deep sadness about living without a purposeful connection to the more-than-human, an ability present in each human, but silenced by intellect, societal expectations and metrics.

*"People get lost in their own managerialism. I think it's much more the colonization of how we see the world, of our epistemologies, of ways of knowing that seemed to suppress the heart, you know, the heart, or that visceral calling that says, I just can't leave this thing. Now, it has to unfold. It's the nature of being, it has to move, it has to unfold."*

Additionally, unexpected responses during the interview provided insights into the participant's evolving perspective on experience as coevolutionary knowledge, which for me, breathed life into the concepts of knowledge, impact and entanglement. The participant's awareness of temporality, more-than-human agency, and material-discursive entanglement, in reflection would have enabled her to prioritise past actions that were rooted in intention and trust in the more-than-human.

*“Well, just experience, the biggest lesson of all is experience. And it just did what I take from here as experience is having lived something inside out, upside down. Every single direction, north, south, east, west above the world, below the world, literally living an experience. It's not one thing I could criticize, I'll just say it's a whole life experience. I take it with me into my next. This word you're talking about experiences, the deepest word there is on the planet.”*

This emergent realisation revealed the participant's placement of learning and growth in shaping their ongoing pursuit of life's purpose and connection to the world. These empirical reflections reveal how an institute emerged as an intra-action between human and more-than-human agentic forces, that transcended its initial intention. The synthesis of various golden threads co-created the institute's purpose, driven and articulated by the founder. The respondent's reflection and introspection probed by the researcher revealed the entwined ontological desire for the institute – to provide a nurturing environment where casualties of systemic oppression could experience beauty, nourishment, and education. Even though the institute intended to create shared value through education, the intent was actualised through integration with the environment that expanded beyond human actors and the institute's geographical boundaries.

### 5.7.2 THE COLLECTIVE EMERGENCE OF A PARTNERSHIP – ENGAGEMENTS WITH PARTNER LEADERS

The findings from interviews with each partner leader are structured according to a fictionalised dialogue (Agarwal & Sandiford, 2021). This form of presenting research findings has been advocated by Agarwal and Sandiford (2021) as an effective way of contextualising phenomenological data. A fictionalised dialogue “involves the re-interpretation and reimagining of co-constructed interview data” (Agarwal & Sandiford, 2021: 223). Even though the scenario of a group conversation is fictional, the interview data presented are still direct quotes from each participant. Presenting dialogue in this fictionalised context enables the reader to “identify and understand the phenomenon” presented and guide the researchers' conclusions on emergent themes (Agarwal & Sandiford, 2021: 224). The following pseudonyms were assigned to each partner, “Cath” represents corporate partner A, “Courtney” represents corporate partner B, and “Natalie” is the Non-Profit Organisation partner leader.

All texts are direct quotes from the interviews, and italicised text represents text that has been added to facilitate a conversational depiction of the dialogue and in the reading of the text.

#### 5.7.2.1 Can you please tell me how the partnership emerged?

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**Natalie:** “it was co-created from the start. We put the work in from the start to really understand what we wanted. I think that set us up for a pretty easy start when the project actually got going”. “that’s quite different because normally they would just fund something and not be as involved in the developing and the co-creating of the concept and of the model”

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**Cath:** *That’s true*, “it was co-created between all partners. then we co-created a Project Plan and a proposal”.

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**Natalie:** “So we were all very involved from the get-go that contributed to that initial planning phase”

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**Courtney:** “it was very much in the co-creation space. a couple of initially informal conversations, developing our thinking and ideas. It started by us saying, let's just get together and have a conversation about it. And that's what we did, we literally sat down and we had a coffee. And we spoke about some of these challenges. And were there ways in which we might be able to start to create something together to address it? And that was it”.

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**Cath:** “that's where all this conversation came *from*”

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**Courtney:** “I think it was how *Natalie* thought because I just thought like because I'm listening to you, *Cath*, I know what to think”

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**Cath:** “we just had an initial conversation to see whether there are opportunities to do something for this project, or if we could grow this project. we had meetings, and lots of meetings and drawings, on boards, and all sorts of things and put together a real really kind of a loose proposal”

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**Courtney:** “it often takes someone and, in this instance, if I recall correctly, I think it was *Natalie from NPO* and *Cath from Corporate A*, it often takes people to go, Oh, you're thinking about this, we're thinking about this and I know *Corporate 2's* thinking about this, as opposed to us being in the conversation. we were all aligned around our content at that point, they were kind of five key things or four key things that we wanted to work together on and we felt we could make a difference together”.

---

The general theme that emerged from this conversation about how the partnership emerged is one of collaborative and inclusive **co-creation**<sup>10</sup>. The participants, Natalie, Cath, and Courtney, emphasize that the project was co-created from the very beginning, involving all partners. They highlight the significant effort invested in understanding the project's objectives and challenges, which laid a strong foundation for its success. This approach stands in contrast to the more typical corporate funding model where involvement in developing and co-creating concepts are limited.

Natalie explains that the partnership was initiated with a **shared intention** to create something

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<sup>10</sup> Emergent themes are indicated in bold font.

meaningful. Informal conversations and open dialogue played a crucial role in shaping the project's direction. This collaborative mindset led to the creation of a Project Plan and a proposal. The involvement of all partners was extensive and continuous, with contributions from various individuals during the initial planning phase.

Cath emphasises the importance of initial conversations and exploration of opportunities. The partners came together to consider the potential of the project, leading to multiple meetings, discussions, and visual representations like drawings. They crafted a preliminary proposal, demonstrating their **commitment to the co-creation** process.

Courtney further elaborates on the role of individuals like Natalie and Cath in driving the **collaborative** effort. Their ability to connect different perspectives and ideas from various stakeholders was pivotal. This approach fostered alignment and allowed them to identify key focus areas for joint action, leading to a sense of **shared purpose** and the belief that they could make a meaningful impact together. The partnership was viewed as a co-creation, enabling shared value to emerge. Without this enabling context, shared value could not have been created and materialised. Hence an understanding of shared value creation as a material-discursive process. Collectively assuming the same role of mediator, sensitivity to **inclusion, communication, femininity**, softness with skilled **navigation of differences**, seeking **alignment** and harnessing collective skills, respecting the different skills and resources each one brings to the table and taking a humble approach, being conscious of the **power dynamic** that can come with being a funder. They emphasise the significance of authentic co-creation and the role of individuals in shaping successful partnerships, highlighting how varying degrees of commitment to co-creation and dynamics between people can impact the success of collaborations.

#### 5.7.2.2 *Why do you think the partnership works well?*

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**Courtney:** "I think it's this combination of three things, kind of physical resources, supporting skills, and then process and innovation and how we work together. in terms of working with the kind of working group and team now, I think you know, we all committed ourselves 100%".

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**Natalie:** "which I think is why we have worked together so well as partners were very deeply invested in the program from the get-go"

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**Courtney:** "you know, there was no power dynamic in the relationship at all right from the beginning"

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**Cath:** "But I would just say, to realize that just because you come with a chequebook doesn't mean that you are the superior in the partnership."

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- Courtney:** "It was like equal partners getting together. It's been one of our strongest partnerships because there's such a firm connection between all three of us to make sure that we help each other out. there's a lot of like, a lot of support, like, sometimes Cath will go, I can see you guys don't have time for this, but you know, we can bring in a resource who can help with that, it's like wonderful" "everybody's pooled resources to help keep momentum and, and make sure that we're on track".
- 
- Natalie:** *I disagree,* "I do think *Corporate A* is the most vocal partner in the situation in the partnership, they are probably if we look at sort of like power dynamics between partners, and this is not in any negative way, but they definitely carry the most sway. We haven't been that vocal, which potentially, also, is why the partnership has gone well, because in a way, you know, we're just implementing partner, and we're not necessarily having strong opinions on what should happen,"
- 
- Cath:** "we never wanted anyone to feel that one was more important than the other. I'm always very aware that when you come in as a funding partner, and you bring the money, it changes the dynamic in the relationship. And quite often, the people that you partner with, then suddenly give you a whole lot more power than it's really due to you and you can abuse that power, you can throw your weight around."
- 
- Cath:** "And I mean, it's obviously this is my opinion, they might have another view, but I probably accommodated them a lot more than they maybe accommodated us."
- 
- Natalie:** "That's why you need this neutral mediator that kind of manages these different interests so that everyone can kind of be happy and satisfied and, you know, share the value. Our project manager plays an absolutely crucial part in maintaining the equilibrium between the partners, I think she's figured out a very interesting way, of balancing the different interests and the different partners."
- 
- Cath:** "And then my role has always been probably the person trying to pull things together at the partner level"
- 
- Natalie:** "And perhaps, perhaps that's been a reason why the partnership has actually gone well" "neutral player that actually is implementing."
- 
- Cath:** "you've got to, you've got to go into these relationships completely equal, you can't you know, pretend you the lawyer that knows more than the accountant or vice versa, it can't be like that." "it's I've got something some knowledge to share, and you've got some knowledge to share. And let's respectfully try and find ways of finding a middle ground"
- 
- Courtney:** "it's really important that you are able to really, and to really put yourself in the shoes of somebody else, to listen and hear what you think. think that's a really wonderful example of how, when you have similar objectives around things, as very different organizations. we really listen to each other, really listen. We'll often find so much that, you know, that encourages us collectively, or so many shared challenges".
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**Cath:** “we collectively try to move forward all the time. to keep this project going and keep it focused on what the objectives were, which was absolutely in well, in my best interest, but also in everyone's best interest”

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**Natalie:** “It definitely is very dependent on the people that are heading it up. You know, who the personalities are and if those personalities work well together or not”.

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**Cath:** and the partners themselves were all of the same mindset. I've learned from the NPO how they approach things very, very different to how we approach things from a corporate perspective. And then also seeing the passion from Courtney, from her side, it has been wonderful to work with all these different people. And they are all incredibly kind.

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**Courtney:** “think that's a really wonderful example of how, when you have similar objectives around things, as very different organizations”

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The general theme that emerged from this conversation about why the partnership works so well is one of mutual respect, equality, effective **communication**, and a **shared commitment** to common goals. The participants highlight how a **collaborative** spirit and **shared values** facilitate a successful partnership relationship, that transcends organisational boundaries. The success of the partnership was attributed to individual and organisational values that resonated across the various partner leaders, indicative of alignment and collective power. What makes the partnership work, is in part, their opinion of this permitted **power dynamic** of being more submissive and allowing other partners to take the lead. The participant emphasises the importance of **co-creation** in partnerships, where each partner felt genuinely heard and involved in its inception. They recognise the power of collective efforts, seeing it as a transformative force in the partnership and **shared value creation process**. The participants express the importance of **open dialogue**, **collaborative decision-making**, and **mutual understanding** in creating shared value partnerships. A theme of **co-creation** resonated throughout the conversation and how important it is in playing a pivotal role in ensuring mutual benefit and balancing the needs and objectives of all partners. The participant acknowledges the importance of the **feminine** aspect in their work, focusing on empathy, kindness, and understanding when dealing with people and communities. They prioritize effective communication and nurturing relationships to create shared value. The participants highlight the significance of genuine **co-creation** and **communication** in partnerships that require active involvement, shared decision-making and dialogue between partners. Effective communication from the beginning of the partnership lays the groundwork for successful collaborations.

5.7.2.3 Do you think it has anything to do with the fact that all three partner leaders are women?

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**Cath:** "Yeah, that's a very interesting point. Yeah. I do think first of all, there's one thing that we all everyone was, is passionate about. "So it wasn't like we were, we had to find each other we were you know, it's like a partnership you just fit and yeah, maybe being women did have, maybe we are much more accommodating and gentle with each other around how we move and communicate."

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**Courtney:** "I think probably I describe it as the power of us as individuals and collectively to really be able to achieve things together"

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**Cath:** "If you can find each other, it could make a huge difference to the work that you're doing"

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**Courtney:** "you can't do everything, you can't do everything yourself, and you can have a much bigger impact with great partners."

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The general theme expressed in this dialogue is that it was not so much that the leaders were all female, but that they evidently had a **shared passion** for the nature of the project. They highlight the importance of effective **communication** and in that an **emphatic approach to engagement**. The leaders demonstrate an awareness of **collective power** and complementary skillsets. The dialogue suggests that a shared passion, effective communication, and each of the partner's unique qualities contributed to the success of the partnership. The dialogue highlights how collective effort and shared values and goals contribute to a streamlined collaboration.

5.7.2.4 How did you navigate differences that arose in the partnership?

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**Courtney:** "I think we navigated that quite well"

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**Cath:** "we've had things we've disagreed with each other. But it's, it's always been, we all believe in the intent behind the project. And that's made, the partnership works so well"

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**Courtney:** "But we've also been very disciplined with structures and feedback and meetings" "We all bring that, and I think that we're so committed and in that third phase of how we meet what we talk about and how we learn from each other is it's been phenomenal"

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**Cath:** "I think it's about keeping your, your kind of marker that north star. I think probably the first thing is to acknowledge that someone else knows something that you don't necessarily know, and you've got an opportunity to learn from them."

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**Courtney:** I love that part, is the diversity of everyone and what everybody brings to who we are as a collective.

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**Natalie:** *We also* "established a steering committee right from the start,"

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**Cath:** "We set up a, like a steering committee, so that could help guide the project. trying very hard to make sure all partner's voices were heard. And everyone felt that they were equal"

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<b>Natalie:</b>	"So, the three of us," "we would discuss any sort of major decisions together"
<b>Cath:</b>	"And in some cases where we were going off track, or one partner is maybe challenging another one around the intention of the project, how to keep that sort of relationship whole."
<b>Natalie:</b>	" <i>But</i> there weren't many differences of opinions or objectives or in different interests. I think we were relatively all heading in the same direction. "I remember one workshop where we brought in an external facilitator to help us figure out our theory of change."
<b>Cath:</b>	"and you can't take a huge, massive, complex situation and suddenly drill it down to three words that make sense to someone sitting in a corporate"
<b>Natalie:</b>	"That meeting really stood out for me as where we were definitely not on the same page in terms of our theory of change." "And actually, at the end of that one-day session, I think we all felt extremely insecure and unsure about where we were at as partners and as in the project as a whole."
<b>Cath:</b>	"And almost the only way to overcome that is to trust the people that you're engaging with and know that they the words that they're using if even they're using it slightly different to you are still aligned to the vision that you kind of together trying to work towards."

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The general theme expressed in this dialogue concerns **effective communication, shared commitment** and the importance of maintaining **alignment amongst partners**. When differences were encountered, the partner's collective intent and commitment aided in overcoming these differences. Each partner also demonstrated how trust enabled **navigating differences** of opinion, but that each opinion was respected. The **leaders'** ability to align their objectives, address disagreements openly, and maintain a collective focus on their **shared vision** has been essential to their success in overcoming differences.

#### 5.7.2.5 *What are your key reflections or takeaways on the partnership thus far?*

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<b>Cath:</b>	"I think what I've learned is that you, can have an idea and share it with other people. And if you are all mutually aligned and kind of get it fit and feel, and there's some value for each partner involved, then really, you can you can, you can do anything".
<b>Courtney:</b>	"So that's a key value for me, It's an alignment" where I say something and I do something completely different. Who I am and what I say and therefore what I can do. What is fair and just. And so things like justice always do stick out for me."
<b>Cath:</b>	"That's the first thing. And in this field, people often do a lot of harm unconsciously, because they think they're doing good, but actually, they're doing more damage than doing good".

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**Courtney:** “Just how important it is as humans that we're really thinking about our learning, and potentially, how that creates and restricts our world views on things because of how we've been presented information and engaging with information and that sometimes we are not that in touch with ourselves, really exploring deep issues”

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**Cath:** “So I've really learned how to integrate and collaborate. It also taught me that, if you want to really solve problems, you got to change the status quo. So you can't just be feeding people, it's not creating change. And all you're doing is kind of perpetuating the same cycle of dependency and the haves and the have-nots. So it made me realize how much more we need to do work that is transformational”.

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The reflections highlight the significance of **alignment, community engagement, understanding local needs**, avoiding unintended harm, **critical self-reflection**, and the **pursuit of transformative change**. The partnership has brought to light valuable lessons that have deepened the participants' understanding and commitment to impactful and sustainable interventions.

#### 5.7.2.6 *Why do you think you got involved in this work?*

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**Cath:** “I was heavily influenced by the environment in which I was growing up living in a country of incredible poverty. But I've always been really passionate about this kind of doing something greater on a bigger scale. But I always wanted to get more into the kind of things that were working with the community. I'm very interested in, in the people side in terms of how people think what they do their experiences”

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**Courtney:** "And so people are at the core of everything that I do": " And I think that's probably been a big contributor to how I view things. I was very much people focused"

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**Cath:** "the one thing is always just first do no harm" "and that would be the same for anything in terms of conversations with people. You know, if I need to give feedback to someone, I'm going to make sure that it adds value to them, that I'm not doing any harm that I'm leaving them better off than, when I got there" "there's a really strong values people. And your integrity is really important"

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**Courtney:** “And, you know, we forget the humans behind things. And so for me, I'm really connecting, I think that's probably a word I would use a lot and that connection is very important to me, and treating everyone the way you would want to be treated and giving each other time”.

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**Cath:** “then personally yeah, I'm interested in how everything connects and interconnects”.

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**Natalie:** “taking a more systemic approach”.

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The participants' motivations revolve around a profound **respect for people**, a commitment to **ethical engagement**, a focus on human **connection**, and a keen awareness of the interconnected nature of **social**

**dynamics and systems.** Their motivations reflect a dedication to **creating positive change** while respecting the dignity and well-being of individuals and **communities.** The participant's strong personal drive was evident, and her compassion for marginalised voices and ability **to create spaces for difficult conversations** emerged as integral to the mutually beneficial negotiations required in the process of creating shared value. There is so much empathy for others, and she takes an active role in listening and trying to balance the needs not only within the partnership but also within the broader society involved in the project.

Each partner thus far is committed to making this partnership work and is **consciously aware** of having each partner's voice heard so that each partner feels equal and acknowledges with humility the value that each one brings to the table. It is a beautiful example of how humility, intuition, conscientiousness and finding alignment can maximize collective efforts to create **transformative value.** The project continuously evolves, and so do all the individuals involved. CSV creates value not only for direct beneficiaries but for every individual involved in the partnership in that they learn and grow. They, too, evolve, and this was clear in their reflection. One is not a participant or implementor of CSV. Everyone is part of the creation and reception of CSV. This **material-discursive process** affects and changes all. It extends beyond the project; CSV is an **intra-active process** that is represented in how these meaningful, artistic dialogues lead to meaningful, creative actions that align with the **shared values** of each partner.

### 5.7.3 CONTRIBUTORS TO THE PROGRAM

The AfriGen program is run by the NPO which comprises three components. The first component, the learning component, involves theoretical knowledge and personal development, and the second component provides practical skills which feed into the third component of producing, donating, and selling produce. The interviews were aimed at understanding the participants' epistemologies in shaping the program and how they envisioned the program to serve community beneficiaries as a means to uncover the philosophy of creating shared value in practice. The following findings presented are interviews held with contributors to the theoretical component of the program. These participants contributed to the content and structure of the learning component. Internal contributors, who will be referred to as Ingrid and Thandeka are employed by the NPO. External contributors, Etienne and Sandeep are not employed by the NPO but have contributed to the program content in terms of their expertise.

### 5.7.3.1 What would you say is your approach to the program?

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**Sandeep:** “So my approach is, how do we first reconnect to the land? How do we find ways that you're not just farming? How are you respecting the soil? Living as part of the soil, but how can I be a child of the soil? This awareness is developing a consciousness of where you are developing an intentionality being intentional.”

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**Thandeka:** “It's not just about the soil, it's understanding that people and soil are all interconnected.”

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**Etienne:** “We are all connected to the soil.”

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**Thandeka:** And for me, it makes sense because it was not just speaking about plants, it was speaking about life. The soil, the trees, me as a human being everything, the air, the wind, everything is one thing that is interconnected. There's no separation. Everything has a relationship and things work together.”

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**Sandeep:** “being able to develop a relationship with the land where you are with nature, and to be able to uphold nature, as a source of knowledge, a source of wisdom, a source of healing”

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**Thandeka:** “So, nature has so much deep knowledge of how it has a relationship. When we're talking about vegetables, there are the mealies, there are the beans, and then there are the pumpkins, all of those need each other, they grow there because they're friends, one is helping the other”

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**Etienne:** “What we do is we go down to the source, at source, there were the roots of the trees in the soil.”

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**Thandeka:** “Students must understand that farming is not just planting a seed to soil farming needs to take care of the environment because we are part of the environment. So your soil is your foundation for life, how you treat the soil will be the outcome of the success of your farm”.

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**Etienne:** “We feel that the system value we engage everywhere, the system value, I can't be so environmentally friendly, but I don't look after the people or I don't look after the finance, you need to, you need to build all of them.”

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**Sandeep:** “And the fact is that even for students, you can't learn about nature by sitting in a classroom. So we take them out, we have this embeddedness in nature. And how do we embed ourselves in the web of life? How do we see ourselves in the way that we bring our energy and our strength and our talent, we put seeds into the ground? And we get our food? And how is this process circular?”

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**Thandeka:** “So we want them to connect deep to themselves, to their land and to each other. We do that through personal development. And then a big part of that component”

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**Ingrid:** “We try and take the educational approach when it comes to messaging, and to show both sides, but also not give the alternative solution, but make people question their own behaviour, and make people question so what is my role in this? And what can I do differently? And also encourage people to ask the right questions” “consistency and so far, it's worked well,” So the more we can share our knowledge and experience with them, the better equipped, they can also become.” And it takes time, but I think in the end it's worth it. It makes everyone better.”

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**Thandeka:** “So the students that need to come through the program need to understand that so that they can go to be the stewards of tomorrow”

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**Ingrid:** "we don't see ourselves as an organization, that's gonna get the solutions to what the future would look like because everyone's context is different" "We try and invoke those, those opportunities to question and to interrogate and to explore. So what can a different future look like and how can I help to make that possible"

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What becomes salient from this fictionalised dialogue is the collective resonance of contributing to **systemic transformation**, an understanding that nature and people are interconnected and that this understanding imparts accountability to serve nature as it serves people. The participants approach **learning as a journey** that is not taught but embedded as an experience. This suggests epistemologies that embrace an **ecological perspective** grounded in themes of **interconnectedness, experiential learning** and an **embedded interrelationship with nature**. Collectively, the participants indicate an **epistemology** based on an intricate web of relationships within ecosystems, where humans, plants, animals and the soil are interdependent. Embracing these epistemologies, the participants advocate for direct engagement with the environment, fostering a respectful and **reciprocal** relationship with nature. As part of this collective both traditional, ancestral knowledge and **personal transformation** have been mentioned.

#### 5.7.3.2 *How do you hope to make a contribution to the program?*

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**Thandeka:** "all you can do is create a learning environment for asking questions and contributing"

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**Etienne:** at the end of the day, we want to make sure that when they make a decision, they understand what is the impact on the environment. We take them on that journey and get them in there"

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**Thandeka:** "to take because of the history of agriculture. Here are farms with grapes and fruit and they have been mistreating people here all of these farms have been mistreating people, they're making a lot of money out of people. And some of the people don't have homes. When your father finishes working here, all of you must be out of this farm. That's like something that's one of the things that even after like we are in, even after how many years after democracy, we're still dealing with those issues. How do we heal the narrative of agriculture within our communities? So we try to make sure that the students that will grow up to be future farm owners don't do what has been done in the past. Because they would they would have the knowledge, they would have the traumatic experiences and knowledge of what the history of agriculture is. So then the story of agriculture is slowly changing over time,"

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**Ingrid:** "we have so much power to do good. it's about respect for people, for animals, for the planet for other people's belongings. Just in general, having respect for everyone and everything. what makes shared value, it's not one person, It's not one organization. It's a lot of different people from a lot of different backgrounds. And those backgrounds matter, you know, in how shared value is created and communicated"

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The theme in this conversation revolves around creating a **positive and transformative learning environment** while addressing historical and ethical concerns in various sectors, particularly agriculture and shared value creation. The participants highlight the importance of creating a learning environment where individuals are encouraged to ask questions, contribute, and gain a deeper understanding of the impact of their decisions. The participants hope that their contribution encourages ethical decision-making and **respect for the environment**. They regard the **empowerment** of future generations to be equipped with the skills to **change narratives** of past injustices and contribute toward a more equitable future. As contributors to the creation of shared value, the dialogue from these participants suggests that CSV is facilitated through **transformative learning experiences** that foster critical thinking, and ethical decision-making in contributing to positive social impact. They collectively refer to the importance of diverse perspectives and backgrounds in shaping CSV as a **collaborative** process.

#### 5.7.3.3 What values are most important to you?

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**Etienne:** “You know, if, if you, if you want to keep stuff anything for yourself, it is negative to you or your family later on and it serves no purpose because in a country like South Africa, we need to share we need to support we need to help one another because the government is not going to do it.”

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**Ingrid:** So I'm a very values person, values-driven person. fairness, transparency, honesty, being ethical, also being approachable, and being open-minded"

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**Thandeka:** “How to be aligned with your values. Because like I was saying earlier, we are different people, I have different values, and you have different values, and there is no way that I can say your values are wrong, but it's how we then co-create values together so that we can take on this journey together so that both of us can learn best, and create an environment for both of us to try?"

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**Ingrid:** “That didn't really align with my own identity. “I'm not one for corporate ladders, or chasing the big salaries or anything like that, it's really more about making a difference.”

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**Sandeep:** one of the gifts in my life in terms of my personal transformation in terms of coming to understand who am I and the fact that I'm just so much bigger than what I represent physically.

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**Ingrid:** “but some of it is also just from learning and reading and opening your eyes to what's happening in the world.”

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**Thandeka:** “So that philosophy is how it guides my life in how we as human beings need each other. And then from that, I respect everyone, I respect the child who is just like playing carelessly in the garden and adults and everyone. And then obviously being able to observe and I'll be aware of your equal”

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**Ingrid:** “To be accepting of people and differences”

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The theme in this dialogue centres around **personal values** that embrace **collective learning, sharing values** and a **desire to serve other human beings and nature**. These participants' values suggest that their understanding of CSV has been guided by principles of ethics and perspectives on **collaboration** embedded in a **personal responsibility** for positive social change. Themes that resonate across the participants' dialogue are embracing the wisdom and **interconnectedness with nature**, collaboration and **co-creation** as a core enabler of creating shared value, an emphasis on living in alignment with personal values and a commitment to have this alignment be present in the work they do, and a **personal motive** towards creating positive social impact through responsible communication, transparency, and purposeful decision-making.

While there are several common themes across the participants' dialogue, individual differences appear that reflect their unique experiences. Each participant's **personal journey** and professional background is distinct, each participant has different areas of focus within CSV, some emphasise the importance of embracing diversity and **cultural understanding**, while others highlight value-driven collaboration. Each participant brings their unique strengths and contributions to the concept of shared value. Some emphasize the importance of traditional knowledge, while others focus on **embedding shared value in organizational culture** or creating custodians of nature. Participants have different perspectives on what constitutes success in shared value creation. This could involve achieving personal growth, fostering meaningful connections, impacting communities, or upholding traditional wisdom.

Despite these individual differences, the common themes of embracing nature's wisdom, co-creation, alignment with values, and focus on positive impact serve as foundational pillars that unite the participants' diverse perspectives on shared value creation.

#### 5.7.4 IMPLEMENTORS

Implementors play a dual role in the program, they act and operationalise the program through implementation but also play a role in shaping the outcomes of the program through their particular stance on delivery. The implementation of the program is open to their interpretation and influenced by their perception of their role. They influence how the program is delivered and provide crucial feedback to partners on areas that need to be changed. They also need to adapt the program to be responsive to the needs of community beneficiaries. These interviews were aimed at understanding how these participants understand their role, their adaptive capabilities and the narratives that shape their worldview as a means to uncover the pathway of creating shared value in practice. The program manager will be referred to as Palesa, one of the educators as Eileen, another implementor who works in the food program as Conrad, and two apprentices, one as Anele, and the other as Ayanda.

#### 5.7.4.1 How do you understand your role?

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<b>Palesa:</b>	"So my job is to really kind of nurture and create this network of support"
<b>Conrad:</b>	"But also, the impact that we are having, and could be having even more as, as this role unfolded in front of us"
<b>Eileen:</b>	<i>My understanding is</i> "that we are there to support and guide. "It's just about a deeper learning. So there is always learning no matter where they come from and what their backgrounds are."
<b>Anele:</b>	<i>For me,</i> "We have to make sure that we teach them everything from making a bed, planting, fertilizing, harvesting, packaging, and all those things."
<b>Ayanda:</b>	"We teach like the practical part And then when they are visitors, maybe let's say from America or so, if they want to know anything we teach them".
<b>Eileen:</b>	<i>What we try to do is</i> "walk a journey with those people and give them the skills they need."
<b>Palesa:</b>	<i>That's true,</i> "because I realized it's really about shaping and co-creating a basic agency with the people. So they have to be a part of the journey, you can't just force them to be part of the journey. Creating, also being from a lens of dignity, and co-creation and creating a agency, rather than having that part and everyone saying that we tend to do this approach. Yeah, it's all about co-creation. And that creates a sense of inclusion and democracy."
<b>Eileen:</b>	<i>I see it as</i> "taking up leadership, about leading, and about being confident. It's about an invitation."
<b>Palesa:</b>	<i>Yeah,</i> "really, really kindling, and enlightening them to feel that they have ownership in this and that this is their project. Then looking at also creating empowerment and ownership because a lot of times there's no confidence so you know you have a certain skill, but you don't know how to sell yourself or you don't know how to present yourself professionally, you know, like be professional in a working place. So we also do some guidance and personal development and create a agency in that space. We have these principles of agency and inclusion, to make sure our learners always feel that they are part of the journey rather than just working on a farm."
<b>Ayanda:</b>	<i>And</i> "I think people know farming is I think, part of a job that is pain, a job that made people slaves. Yeah. They think that if you work on the farm, you don't get paid. And maybe there's a boss who was throwing stones at your back while you were working. But I think there's happiness and farming it's no longer like that because we are trying people are trying to change the way people work."
<b>Palesa:</b>	<i>So,</i> "by doing an embedded approach, we try to change narratives by reconnecting people with themselves to reconnect with nature"
<b>Eileen:</b>	"It's about pushing all of that love for learning, that love for nature, which is one of the most important things we do."
<b>Conrad:</b>	"And you have to be adaptive in your role"
<b>Palesa:</b>	<i>Yeah</i> "things are never static, it's always moving, then we need to make sure that the project can respond to these changes."

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**Conrad:** *Even* “my role actually unfolded as I started working. the entire thing grew on me. And it's still growing on me. It's still unfolding.”

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**Palesa:** "That's one of the things I'm getting used to is that my role is never going to be static, it's always dynamic because the product keeps changing because it's really influenced. Because the system is so dynamic."And then there are actual people, not just elements or objects within the system, then it's always going to be changing in response to the economy, the social needs, as well as the environment"

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These participants understand their role as facilitators and mentors for nurturing, supporting and empowering community beneficiaries of the program. They articulate their roles in which both practical and life skills are taught as both inclusive and **co-created** with the community. Their role includes fostering confidence, dignity and **agency**, and instilling a sense of ownership and inclusion. They view their role as an invitation to lead, educate and inspire others to reconnect with **nature** and a love for learning. They also acknowledge the nature of their role as dynamic and need to be adaptive and responsive to needs as they change. In terms of shared value creation, the participants act as facilitators in delivering CSV. Their approach involves a co-creative, respect for diverse perspectives and a direct connection to the community they serve with accountability to relay concerns to program and partner leaders. Overall, the participants articulate their role as **catalysts for creating shared value** towards the outcomes of meaningful and **mutual learning**.

#### 5.7.4.2 *What are your personal values that you think influence the work that you do?*

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**Eileen:** *For me,* “I try just to live my life with that kind of values of respect and sincerity and being kind always. And when I can take care of other people, I will because we are put on this earth to serve.”

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**Conrad:** “That mutual respect and love for human beings is I think, at the core of my value. You know love for fellow human beings. Love can be translated into many things, care, respect, all of those things. I strongly believe that. You wish any human being to treat another human being with the utmost dignity and respect. And that's one of my values, it's, it doesn't matter if you're poorer than me richer than me, I expect you to treat me with respect.”

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**Palesa:** *Yeah, and here* “we have a set value-based principles, a value of principles. And, we just, we have this drive”

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**Conrad:** *Exactly, and that's why I left my other job, I thought to myself,* “If I stay there, what direction is my whole life going in? It was totally against my grain. So I thought, I need to find a place where you will people treat each other with human dignity and respect and with values.”

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**Eileen:** "you always lead by example”, *but I also think it's* “about being yourself and being an enabler. Living in the present and not taking life too seriously. Being a good role model. It's also about being vulnerable, being able to deal with mistakes and those kinds of things.”

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**Palesa:** *And about systems right? Because* “looking at a system, things are not in isolation. I'm connecting to more of the living world through understanding”

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**Conrad:** “But it's also about to me, it's about how humans treat one another. It's just to put it simply, and that that can and that's nourishing to nourish humans is to put it like in a nutshell”

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**Palesa:** “So right now my frame of mind is that I look at a food system as a socio-cultural system, and then my interest is seeing how then we can kind of help with fixing.”

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**Conrad:** “And one of my core values is you as a human being are responsible to sort that out in yourself. You know, it's within your power. My short slogan is one word, it's unself. And that, to me means not to live within yourself, for yourself selfish desires about me. Live out of yourself into others. Put yourself in somebody else's shoes. What would they like to get from you today? What would they like to hear? What would they like to experience from you I'm not saying that I'm getting it right. But it's like that you can navigate towards so yah, unself.”

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From this dialogue, the **personal values** expressed by these participants resonate with their work, guiding their interactions, decisions, and approaches. Respect, kindness and sincerity are central values for Eileen, shaping her commitment to serving others and being a role model. Conrad's value of mutual respect and love for human beings drives his belief in treating everyone with dignity and advocating for mutually respectful interactions. Palesa emphasises value-based principles and **systems thinking**, reflecting her dedication to understanding the **interconnectedness of the living world** and being **responsive to socio-cultural issues**. Conrad's value of “unself” encapsulates his belief in living beyond oneself and being considerate. The personal values of these participants suggest shaping their roles as facilitators of shared value creation, guiding their efforts to create positive change, build meaningful relationships and contribute to a more respectful, interconnected and compassionate world.

#### 5.7.4.3 How would you describe your experience in this program?

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**Ayanda:** “Yoh, I've learned a lot. I mean, I was a very shy person so now I am able, to speak in front of people as we are like, there's a lot of visitors that are coming on our farm, so I am able to teach them what we are doing here on the farm. I have learned leadership skills. Yeah. And I have learned to work independently. I've gained skills, there's a lot that I've learned”

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**Eileen:** “When I started, I couldn't say two words, I was super shy and I was the house mouse and I think I only broke out from that shy little house mouse to now not shutting up and they'll be like now, just be quiet. *My* previous mentor, who I hadn't seen in years, *met with me* and she couldn't believe, it because we knew the journey, what it was and it was just amazing for her to see. *She said:* oh my god look at you, completely different person.”

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**Palesa:** *So* that's also part of my drive, “we're learning together on this journey.”

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<b>Eileen:</b>	“Yeah. <i>So</i> it's taught me a lot I think personally”
<b>Ayanda:</b>	"I used to be lazy, but then I found that I was in the right place. The right path for myself. "Yeah, it's different. Now. I'm thinking of going back home, or even if I could find a piece of land here to make my own thing."
<b>Eileen:</b>	<i>And</i> “we all learn together, it's never, there's never a dull moment, there's always something they show you there's always something you learn. And it also then comes back to us being able to get that feedback and be able to learn”
<b>Conrad:</b>	“So it's an interesting journey for us all. And I'm still learning a lot.”
<b>Eileen:</b>	“It will continuously teach me because I'm learning from other people to make mistakes so that they can learn from it so that they can be able to do that”
<b>Conrad:</b>	<i>And</i> “it just unfolds, which is a beautiful thing and a vessel for my own growth and healing in a big way.”
<b>Eileen:</b>	“And as a leader, it is important because this is stuff that I've learned, you can't always be strong, you can't always be hardworking, you can't always be the one that's just like, everything's okay and then there's a fire burning behind you. I've learned to be vulnerable”
<b>Anele:</b>	<i>Individual and collective learning is embedded in everything we do</i> , “we have a quarterly report, for example, it's a tool that documents what is to be done in the garden and what needs to be done, what we have achieved and what needs to be improved things like that. Yeah, how much we sold, and how much we need to produce more, how can we work if we have challenges how can we overcome those challenges.”
<b>Palesa:</b>	"And I think that's where a lot of the learning comes from. All this thinking, planning and like, you know, figuring things out. Jointly. Like, in terms of the learning to happen, how do we then look at our environment in a way that's educational? then I mean, that's when things change, like last year, because we realized that we're not creating a space conducive for learning.”

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The participants describe their experience in the program as transformative and rich with **personal and collective growth**. Ayanda speaks of overcoming shyness and developing leadership skills, while Eileen recalls her journey from being shy and reserved to becoming more outspoken and confident. The participants emphasize the continuous **nature of learning**, both individually and collectively. They highlight the value of **shared experiences**, learning from mistakes, and working **collaboratively to improve and adapt**. The program has instilled a sense of purpose and direction, leading Ayanda to consider her future in farming and inspiring Conrad's growth and healing journey. Vulnerability is recognized as an important aspect of leadership and growth. Anele discusses the documentation of achievements, challenges, and improvements, which fosters a **culture of reflection and learning**. Palesa underscores the significance of active planning, problem-solving, and environmental awareness as essential components of her **learning experience**. Overall, the participants express how their involvement in the program has not only equipped them with practical skills but has also brought about **personal transformation** and a deep sense of purpose.

### 5.7.5 COMMUNITY BENEFICIARIES

The community beneficiaries include two participants who were directly involved in the program and another two participants who are representatives of the community the program is meant to serve. They were interviewed to understand the program's engagement with the community's concerns and how value was extended to and received by these participants. The interviews were aimed at understanding a bottom-up perspective and approach to shared value creation. Pseudonyms were assigned for each participant to ease the reading of the text, protect participant confidentiality, and facilitate the contextualisation of the text. The female direct beneficiary of the program will be referred to as "Fiona" and the male as "Marvin". The two community representatives will be referred to as "Candice" and "Ryan".

There are distinct perspectives represented from these two groups of participants, those who were directly involved as beneficiaries in the program and those who are part of the community that were meant to be served. For this reason, the fictionalised dialogue will be presented separately to demonstrate the differential perspectives.

#### 5.7.5.1 *So how have you benefitted from being involved in the program?*

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<b>Marvin:</b>	"For me also Yeah, after this I'm gonna go back to college to study further"
<b>Fiona:</b>	"For me it was, I was really shy. These type of people has taught me how to speak more and communicate with other people"
<b>Marvin:</b>	"for me, it was like starting with what you have and building with what you know to make something out of nothing. Yes, for me it was like I wasn't talkative but now that nature led me to a positive energy so that changed my life about nature so that's why I love nature"
<b>Marvin:</b>	"I've had a good experience so far. And I love them I would be really honest, I would like to be permanent here, to be honest, I don't want to go here as I see life"
<b>Ryan:</b>	"The experience was, while they did everything in their ability to help the child, you know, they really good at what they doing, they did a good job, they really did a good job of supporting and helping and doing everything in their power and their ability to do you know, they did well. they feed the children, you didn't have to put in anything your child get the food"
<b>Candice:</b>	"The school gets vegetables from the farm, if I got it right and there's a woman opposite the station that makes the food. The farm also supports the school but it's only during school times but the need is much bigger".

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Being involved in the program has brought about numerous benefits for the participants. Marvin mentions his plans to further his education, indicating that the program has inspired him to pursue tertiary education. Fiona highlights how the program has helped her overcome shyness and improve her communication skills, allowing her to interact more confidently with others. Marvin also shares how the program has instilled the values of resourcefulness and positivity in him, motivating him to make the most of his abilities to build something meaningful. Ryan expressed gratitude for the program's support in providing essential resources and assistance, particularly in feeding the less fortunate, even though as expressed by Candice this initiative has not been sustainable, and that the need is so much bigger.

Overall, these participants have experienced **personal growth**, increased confidence, motivation for education, and practical support as direct benefits for their involvement in the program. They express gratitude for the initiative and its intention, but that the emotional and nutritional needs in the community are significant.

#### 5.7.5.2 What do you think are the most prevalent issues in your community?

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- Marvin:** *For me, definitely, "gangsterism, I was involved in gangsterism, but then I left"*
- 
- Fiona:** "For me, personally, I also failed my matric, I want to rewrite and study further, but I also have a baby and one day I want her to be proud of me".
- 
- Candice:** *Yes, one of the biggest "problems in our community is teenage pregnancies and I think that people are still shy. I feel that the parents and the children should be educated. Somebody should sit down and talk to them, but everyone is talking around it. The problem is that parents are not talking to their children and neither does the school and they expect someone else to talk to their children."*
- 
- Fiona:** "Well in my community we don't talk with each other. We are always on our own, we don't share anything with each other. There is no communication or talking about issues."
- 
- Ryan:** *Even though "it's a very close-knitted community, the bad thing is obviously alcoholism, the bottom line is alcoholism"*
- 
- Candice:** "There are parents who drink heavily and never have time for their children, *but also* "drugs because there's nothing for the children to do here so they sit in shebeens, use drugs because remember drugs come with a group and it makes you feel that you belong. Our children need groups but a group that brings something to their lives and brings something positive."
- 
- Ryan:** *Yes, I agree, "in the community itself there are dams and so summer days they will usually go to the dams or go to the river, and sometimes they will drown because there's nobody watching over them"*
-

- 
- Candice:** “Most of the children who live on the farm and come from the farm can't cope with completing school, so if they have something in place for these children that will be very good.”
- 
- Ryan:** “In the farming community, yes, education is a problem, It's the biggest”
- 
- Candice:** “Something must be set in place so that the children stay busy, get the older children to train the younger ones if you as a coach can no longer be there. Something must be really set in place otherwise we are going to lose our children. Here in our community, it's just getting worse, last night 2 cars were stolen. It's just going to get worse and worse if there's nothing set in place for our children.”
- 
- Ryan:** “That's why my work was about uplifting children, that's my passion, to create more upliftment for the children because they are the future. I worked for an NGO in the community where we did after-school programs and holiday programs for children. We did sports, creative arts, and entrepreneurial things with the kids. Because when school stops at two o'clock, after two there's nothing happening for children. So that was the idea how can we get the children busy? How can we develop their mind how can we uplift them?”
- 
- Candice:** *The same goes for the younger children that's why,* “I started the creche on the farm. I started another creche at another farm, then I have the 2 aftercare, one at my home at one at the farm”
- 
- Ryan:** *But also, the parents, it is so* “difficult, for people to work together, because of our different mindsets in the community. Because most of the time, it would either be, we are not educated enough, or we don't have the management skills to manage. And sometimes people manage with their emotions. They manage with their family history. You can't change if your mind doesn't change. So their role should be to the mind of people, the farming community, there's no exposure on farms. There's no computer literacy, so farm people don't get exposure to things. There are no long- term plans that are made to change the mindset of people.”
- 
- Candice:** *I actually began a women's workshop in the community because of this,* “I wrote the workshops myself and got 6 women to see if it's going to work. In the end, there were only 4 women and the 2 said it's too personal for them and they don't want to be part of the workshop. It deals a bit with your past and your finances and yourself and yourself within your community. I decided to do the workshop to write the workshop because it actually started with me as a person because I struggled, and it worked out well for me so why don't I see if it can work for someone else and that people trust you with their lives and their future? So, if people trust you then I feel you can make a difference in their lives if they are prepared to change. So, if people come to you and tell you their life story that tells you that the person trusts because we in the community keep everything to ourselves”
- 
- Ryan:** *And, also* “farm people believe we can't do anything. And that's the sad part. We believe we can't do anything because that belief is ingrained in our DNA as we grow up and that's the sad part. But on a farm there's, you don't see any other way of doing things. And you are mentally depressed, because of the way things are run on farms, you must just accept things.”
- 
- Candice:** “I didn't talk about the arts and drama that we have once a week on a Friday for those who are struggling emotionally.”
-

<b>Ryan:</b>	<i>You'll see it if</i> "you go to farmhouses of the workers, it looks terrible, and not because the people don't look after it, they can't. Because the reality is you know, the reality is they can't, they earn a little salary just surviving"
<b>Candice:</b>	<i>And</i> "then there's also the unemployment factor amongst our youth. So, at the moment I'm looking to get work for the older children"
<b>Marvin:</b>	<i>Yes, before the program,</i> "I was at home doing nothing"
<b>Fiona:</b>	<i>Me too,</i> "I was also at home looking for a job"
<b>Candice:</b>	"If you look at the farmers that have restaurants and guest houses, they employ people outside of the farming community."
<b>Ryan:</b>	<i>Yes, that's because,</i> "in our communities, the resources go in one direction. That's not spread evenly, it will go to the farm owners and their families. Like I said, if you go to farms, you'll see two things. You'll see a worker and then you'll see management, and I'm talking now people of colour and then you'll see the owners which is 90% white. Then you will find that the farm owners or the people with the resources, they will have NGOs running, they will have family trusts running, it's been given to the community but not given to really develop it, given with a hand on it, if you know what I mean, they still controlling this. And it sounds like a run-off thing, but it's not been shared. As much as they want to claim it on farms. It's been shared but it's not being shared"
<b>Marvin:</b>	<i>Yes</i> "I live in the farming community nearby, but there I saw that was no life for me"
<b>Ryan:</b>	"Today, up until today, my mom is still staying on the farm, the water is still being put off at certain times of the day, even though we don't have a water crisis, but because of decisions that are made on the farm, which the worker don't have any say in, they must now live with that condition."

From this dialogue, the issues identified by these participants encompass a range of challenges. Gangsterism and alcoholism are identified as problems, with some participants having personal experiences related to these issues. Teenage pregnancies are a concern, with a lack of open communication and education among parents and schools. The lack of opportunities for youth engagement and youth unemployment has been identified and related to drug use. Disparities in education, limited exposure to technology and skills development have been identified as key issues within the farming community. Limited community collaboration and the belief in the inability to effect change compound these problems. There is a sense of injustice, with unequal resource distribution. Overall, from this dialogue, community members express a range of social, economic and educational challenges that hinder well-being and progress.

Two of the participants' accounts highlight the potential for creating shared value through experience-driven initiatives in their community. These include after-school and holiday programs, women's workshops, and youth engagement efforts aimed at addressing the prevailing challenges in the community. Driven by the lived experience of these participants, these initiatives offered platforms for

education, skills development and personal growth for women and youth in the community. The initiatives provided opportunities for positive experiences aimed at counteracting issues such as substance abuse, childcare, teenage pregnancy, and physical and emotional abuse. The experience-driven nature of these shared value initiatives created trust in the community, promoting dialogue about sensitive issues in a community that lacks a culture of dialogue. *Experience-driven initiatives* have the potential to create more inclusive and collaborative environments and contribute to the creation of shared value that improves livelihoods, educational opportunities, and community well-being.

#### 5.7.6 COMMUNITY ENGAGEMENT

The following dialogue consolidates what participants have discussed in relation to the theme of **community engagement**. This fictionalised dialogue presents the participant quotes as a conversation between Partner Leaders, Implementers and Community Members. The interviews were aimed at understanding the participants' intention for engagement with local community members, whether it was actualised in practice and how community members experienced this engagement.

##### 5.7.6.1 *Let's talk about community engagement, how do you engage with the local community to help inform the work that you do in the program?*

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**Ayanda:** "We are trying to work with the community, like to help them where they need help. And we're not just like guessing what you want, but we like going to see what they need and communicate with them. What are the things that they need, like the challenges that they come across so that they can be able to, solve them with them".

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**Eileen:** *We try to deliver* "a well-rounded, holistic kind of approach, to also involve the community."

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**Ryan:** *You* "did not engage with communities, It was more a case of what you wanted to establish. It's coming in doing something without involving the community. This is what happened to a lot of farming communities".

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**Cath:** *Yes, I think* "we were naively thinking that we could just go into the community and teach"

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**Ryan:** *Look* "one of my children was afforded a bursary at school. He's not there anymore. But, because it was one of the first English schools, okay, for people of colour. Most of the kids were of colour like 90%, but because of the English, because the community was Afrikaans, the kids suffered, you needed to adjust to that part which was a bit sad."

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- 
- Natalie:** *Honestly*, “I think our interests as partners were well represented, but we didn't actually really try and understand what was needed in this valley and what was needed in this community, and how we would address that”.
- 
- Ryan:** *In my experience*, “whenever companies or NGOs or people come in to do something, it's always the focus is always on what can we do in the community, not what is in need of the community. We want to do this, but we going to focus on what we want to achieve. I know this because I worked in the NGO sector.”
- 
- Eileen:** *Yes, but that's why* “our biggest focus right now is engagement. And that includes doing things for the community, with the community and as a community. So what we're trying to do is we are trying to involve the community more than we have ever had before in a long time.
- 
- Palesa:** “And like, that was one of the things like really trying to create and develop relations for the community”
- 
- Candice:** *Yes, but the thing is, what you need to understand is that programs of learning*, “don't just come with learners that you must develop and stimulate, it comes with community problems like which family member has AIDS and who hasn't got food and who saw someone's brother murdered. I have a creche, so I know, you get parents who tell you in confidence how their husbands abuse them, how they fight, and how their children are on drugs. A place for learning comes with all these community problems.”
- 
- Palesa:** “Honestly, we really tried to give opportunities that really help to broaden and to shape learners as change agents within themselves, the households or communities”
- 
- Eileen:** *And we have done so many things to involve the community*, “we do things like festivals. Where we all come together and do some fun stuff. We had our anniversary celebration, we've done things like open days, where all three programs, opened their doors, and we actually showcase what we do and why we do it and how we do it.”
- 
- Ryan:** *But* “you're not really addressing the real issues, because you come in with a mandate or an agenda. And at the end of the day, come and they go.”
- 
- Candice:** *I mean*, “in previous years you had the feeding scheme at the school and when parents didn't have they could get something at the school. These days you no longer give parents food at school. I don't think that you should just take things away but put other things in place to make it better.”
- 
- Palesa:** *Yes*, “Because once you are part of understanding how things work in practice, then you understand why certain things can and can't work. And then you're also going to be more, I think committed to making it work.”
- 
- Cath:** “That's like the first thing. And in this field, people often do a lot of harm unconsciously, because they think they're doing good, but actually, they're doing more damage than doing good.”
- 
- Natalie:** *I agree*, “I think we should have involved the community, we should have understood better what the community needs are.”
-

It is clear from this dialogue that various initiatives and efforts were made to engage with the community. However, this experience is not reflected by community members. As expressed by Ryan, a community member, there was a historical lack of community involvement in these initiatives, and a more concerted effort is needed to really engage in understanding the local needs. This shortcoming was reflected in two partner leaders, Cath and Natalie, who expressed the need to involve the community more in the initiative. This lack of engagement has been identified by implementors Eileen and Palesa, who have shifted priorities to include more engagement with the local communities, with an understanding that **engagement has to be continuous to be able to adjust priorities in practice**. Overall, the dialogue reflects a range of experiences in community engagement and highlights the significance of understanding, involving, and addressing the needs of the community for effectively mobilising shared value creation.

## 5.8 SUMMARY OF EMERGENT THEMES

The themes reflected in the preceding section were further analysed in the context of creating shared value. The following table presents a summary of the between participant subthemes and whether these served as enablers, constraints or accelerators of shared value creation as a process emergent from the collective experiences of participants. These factors will be discussed in more detail in the discussions section that follows:

*Table 18: Analytical Subthemes and CSV Impact*

<b>Impact on CSV</b>	<b>Between Participant Subtheme</b>	<b>No of Times Coded</b>	<b>No of Participants</b>
<b>Accelerator</b>	As a Living Philosophy	9	4
	To Change Narratives	6	3
	As a Collective Journey	16	5
	Feels sense of Social Responsibility	13	5
	Values of Reciprocity	8	5
	Reflection Practice	9	4
<b>Constraint</b>	Lack of Contextual Understanding	5	2
	Conflict in Intent and Purpose of Shared Value Creation	11	4
	Ego's	5	4
<b>Enabler</b>	Alignment and Embeddedness	22	7
	Co-creation	16	5
	Collaboration	4	3
	Dialogical Process with Community	8	3
	Agency of the Human and More-than-human	23	9
	Contextual Awareness	12	7
	Heart Epistemology	17	3
	Responsive and Adaptive to Context	20	8
	An Empowerment Device	3	3
	Experience-Driven	11	5
	As a Reflective Journey	17	6
	Purpose-driven from Lived Experience	45	14
	Navigating Differences	8	3

## 5.9 DISCUSSION

Using phenomenological analysis and hermeneutical iteration between the raw text and personal reflection, this discussion seeks to transcend textual examination, by delving into the reflections of the participant's lived experience to reveal the essence of creating shared value (Gill, 2014; Sanders, 1982; Schutz, 1970; Verhaar, 1967). The empirical material reveals a narrative of creating shared value, unfolding as a collective emergence of deeply personal and transformative experiences. The exploration of creating shared value through the applied theoretical framework of process-praxeology has yielded new insights that contribute to an enriched understanding of this phenomenon. A central finding is the intricate entanglement of shared value creation as a lived and living philosophy (Dewey, 1929a, 1929b). The intricate integration of participants' life worlds lived experiences, and experience of value creation has revealed a deeper understanding of the complex intra-actions that create shared value (Barad, 2007). This insight is somewhat aligned with Blowfield's (2012) argument of the strong linkage between CSV and leadership, but the findings from this study extend this linkage beyond leadership. CSV is driven by individuals who resonate with its values and mobilised throughout the organisations.

The symbiotic relationship revealed in this study underscores the significance between personal narratives and experiential context in shaping how shared value emerges and is scaled. A relationship similarly articulated by Glauner (2019), is an interaction of mutual benefit, and an enabler of shared value creation. Another notable contribution arises from framing shared value creation within the contours of process-praxeology. This reframing presents shared value creation as an interactive, integrated emergence. As visualised in Figure 37 a diversity of experiences intersects in the creation of shared value.

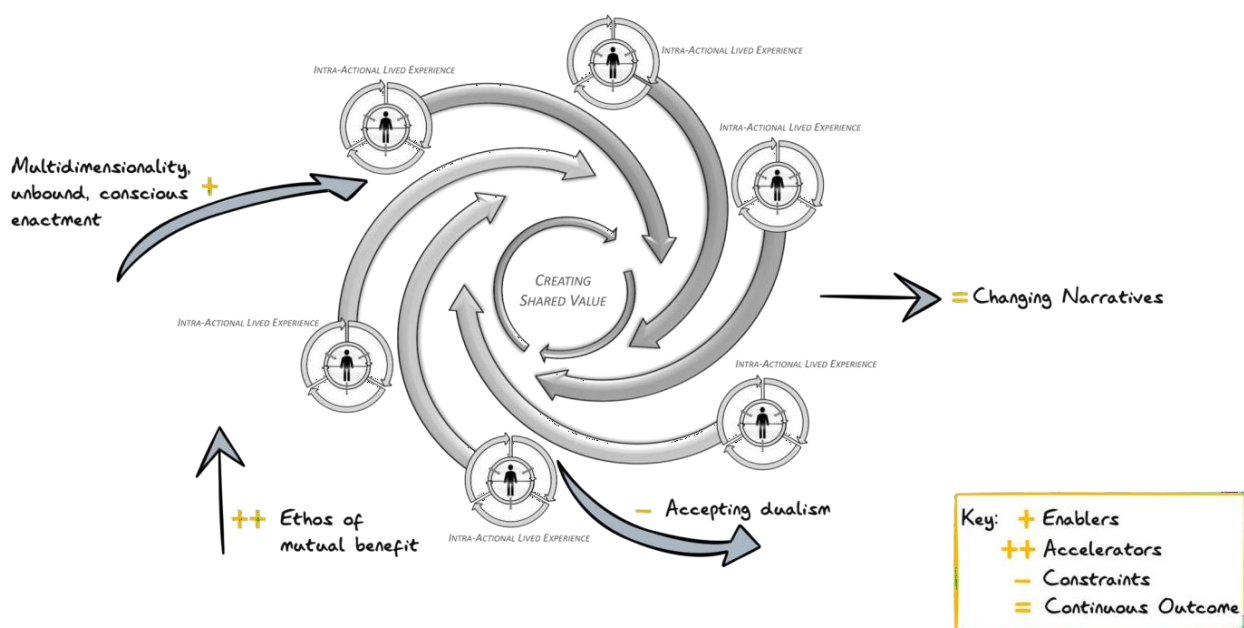


Figure 37: Process-Praxeological Phenomena as the Collective of Intra-Actional Lived Experiences

This expands current conceptualisations of shared value creation in the literature as a strategic concept (Alcaraz & Hollander, 2019; Blanchard & Gray, 2019; Corazza et al., 2017; Fernández-Gómez et al., 2020; Kanter, 2008; Laudal, 2018; McEvily et al., 2003; McIntosh et al., 2016; Moon & Parc, 2019; Muthuri et al., 2012; Porter & Kramer, 2011; Saenz, 2019; Serra et al., 2016; Spitzeck & Chapman, 2012; Yoon, 2017). Instead, this insight into the integration of practice and experience offers a reimagining of CSV as a mindset, rather than a strategy. The creation of shared value emerges as a way of being and a way of doing, a philosophy interwoven with not only organisational practice but daily individual practice, which challenges the dualistic distinctions in previous literature (Alcaraz & Hollander, 2019; Blowfield, 2012; Castro-Martinez & Jackson, 2015; Daniel & Sojamo, 2012; Fernández-Gómez et al., 2020; Laudal, 2018; McIntosh et al., 2016; Mirvis et al., 2016; Saenz, 2019; Serra et al., 2016; Wieland, 2017). Moreover, the study concurs with the assertions of Berti and Mulligan (2016), Dembek et al. (2016), Florin and Schmidt (2011), Kramer and Pfitzer (2016), and Porter and Kramer (2011) who advocate for a relational, performative approach to creating shared value. This patterning however gets constrained or enabled depending on the ethos of the approach adopted (see Figure 37).

The findings illuminate the concept of enactment, articulated in Karl Weick's (1979) theory of organizing, as the interaction of the organisation with its environment, by ascribing this environment with agency. This implies that not only does the organisation interact with its environment, but the environment interacts with the organisation. In addition, the concept of enactment is expanded with consciousness, as revealed in the empirical findings, enactment implicates active engagement and reflection to actualise the co-creation of shared value.

Central to this exploration is the recognition that creating shared value transcends the understanding of mutually beneficial economic and social value. Creating shared value is creating added value, an articulation shared by Azmat et al. (2015), Bulcke et al. (2020) and Glauner (2019) that is beneficial for all agencies involved – nature, self, organisation, and community. As such, shared value creation cannot be comprehended within the limitations of dualisms, it is not dualistic, but a multi-dimensional phenomenon.

Creating shared value needs to move beyond the paradigm of scarcity, which is the argument made by Glauner (2019), towards a paradigm of abundance because in practice the phenomenon of shared value creation is not realised as value that is distributive. These insights are echoed by Glauner (2019), who argued how the imposition of dichotomous entities as a consequence of a scarcity paradigm imagines shared value creation as value that needs to be shared at the cost of another. Therefore, the acceptance and emphasis on dualism affect the natural patterning of enaction (see Figure 37). Glauner (2019), argued for changing the mental models that drive destructive wealth creation towards mental models of

abundance which would enable more inclusive value creation. A sentiment that is echoed in the empirical findings in this chapter.

Rather, shared value creation is actualised through partnering, through the emergence of innovative and creative ideas, that enable added value to emerge which extends beyond the boundaries of a single organisation. Cross-sectoral partnerships enable and scale shared value creation through the collective insights, and expertise required to create added value. As a multi-dimensional phenomenon, shared value creation requires multiplicity and innovation for its realisation as a continuously emergent process.

In addition, the added value created is not limited to the exchange of tangible resources, but the intangible, such as knowledge, values, and even philosophies (Campos-Climent et al., 2017; Comer & Pavlovich, 2016; Holford, 2018). Articulating shared value creation as a collective learning journey for all stakeholders involved is revealed in this chapter. This enables the adaptive, dynamic capabilities, and conscious enactment needed to mobilise an opportunity- and action-oriented approach for CSV (Teece, 2007, 2018; Weick, 1979; Weick et al., 2005). Therefore, future research may want to consider the intra-action between the unbound organisation and dynamic capabilities.

For practitioners working in the area of shared value creation, this research illuminates potential pathways that enable, scale, or constrain the creation of shared value. From the empirical material, creating shared value is enabled through practices of conscious enactment and learning. Both of which have the potential to be institutionalised as organisational practices. In the case study, these have been institutionalised through reflexive reporting, requiring both collective and conscious engagement with challenges, solutions, implementors and community input. Shared value is scaled when embodied as the lived and living philosophy of multiple stakeholders. As an embodied and living philosophy, creating shared value becomes an empowering, enriching imperative that seeks to change disempowering narratives and create sustainable, transformative change (Heracleous & Jacobs, 2008; Ignatow, 2007). These insights can inform practitioners to consciously select and seek particular individuals who resonate with the values expressed by participants to drive shared value creation initiatives.

In its practical implications, this research illuminates the intricate tapestry of shared value creation, unfolding the tensions and nuances that characterise its realisation in practice. By framing shared value creation as a process-praxeological phenomenon, its essence extends beyond organisational boundaries or practices to the substrate of daily conduct, as a fusion of ways of doing, and ways of being. These findings support Glauner's (2019) argument for an ecological approach, extracting the wisdom of symbiosis from nature and reimagining a new ontology to create shared value. This resonates with the

central argument that ontology, epistemology and ethics are entangled with agency in shaping the realisation of shared value creation as a process.

## 5.10 CONCLUSION

This case study addresses the research question of how collective organisations converge through partnership to create shared value beyond organisational boundaries. Which becomes manifested in human actions, and the agencies of the human and more-than-human. In addition to realising the transformative potential of shared value creation. By embracing process-praxeology enriched with phenomenological analysis, this research introduces ways to unfold shared value creation that is infused with purpose, mutual-beneficial ways of doing and ways of being, as well as impact that compliments the conceptual intent of an authentic creation of shared value as a process-praxeological phenomenon.

The synthesis of these insights culminates in a paradigm shift of shared value creation as an ontological philosophy. By viewing the world through a lens of shared value creation, harmonious coexistence with nature emerges, embodying an ethos of mutual benefit. The incorporation of Barad's (2007), agential realism, elevates this understanding, attributing qualities of agency to the environment itself. This conceptual evolution opens a new frontier of inquiry into the reciprocal interactions between humanity, organisations, and the environment, thereby expanding the discourse of creating shared value.

In conclusion, this study deepens existing conceptualisations of creating shared value as a complex, multi-dimensional and multi-agentic phenomenon. It calls to action the integration of personal narratives, environmental agency, and ethical responsibility in the process of CSV. A phenomenon that is catalysed through collaboration, innovation, and the engagement of interconnected lived experiences. The essence of this chapter unfolds shared value creation as a living, evolving, agency-driven endeavour that catalyses learning and continues to enrich organisations and the environments within which they operate.

## CHAPTER 6: CONCLUDING REFLECTIONS ON THE TRANSFORMATIVE POTENTIAL OF CREATING SHARED VALUE

*“Don’t cry because it’s over, smile because it happened”*

Dr. Seuss

The culmination of this thesis, titled "Purpose, Profit and Process: Organising the Creation of Shared Value in Emerging Economies," concludes by bringing me to a pivotal conversation that encapsulates the essence of an entire journey. In traversing the complex terrain of knowledge acquisition in academia, a resounding revelation emerges – knowledge as the intricate tapestry woven from the interdependence of human experiences, natural forces, and agency. This intricate web of interconnections forms the substrate upon which my understanding of phenomena now rests.

Central to this exploration is the profound understanding that knowledge, in its pursuit and revelation, is inherently entwined with ethical, ontological, and epistemological implications. Every aspect of uncovering knowledge is imbued with the interplay of personal biases, experiential narratives, and the profound role of my own subjectivity. This awareness is where the insights of Barad have come to fruition – the act of uncovering knowledge is not a passive revelation but a dynamic process of selective sharing and shaping, in our idiosyncratic experiences.

As I embarked on this research journey, the notion of a "golden thread" emerged as a guiding force. A thread of critical organisational scholarship woven together by a theoretical framework of process-praxeology into a tapestry of connectivity, interrelation, and understanding. All converging to connect the dots that comprise the essence of shared value creation. This framework not only aided me in recognizing these underlying threads of personal narratives and discursive contexts but signposted the material manifestation of how these narratives direct the broader landscape of knowledge creation.

The fabric of this exploration draws attention to a fundamental truth – organizations are not entities but living embodiments of narratives, emotions, and historical trajectories (Heracleous & Jacobs, 2008; Nayak et al., 2019). This understanding dismantles the reductionist, representationalist perspective that seeks to render organizations as static, objective constructs. Instead, organizations are living organisms, constituted by collective narratives, reflections of emotions, family histories, learning journeys, intelligence, development, and growth.

The act of removing the human element from organizations, and de-personifying this living organism reveals a stark truth – that organizations cease to be. Beyond mere structures and titles, organizations derive their vitality from the lived experiences that comprise them. The agency, expounded by Barad (2007), extends to the non-human, enhancing our comprehension of shared value creation. This collective agency catalyses the continuous emergence of shared value, echoing the interconnectedness of conscious beings, environments, and communities. Even in the realm of artificial intelligence, this interplay of socio-material forces and agency resonates in significant entanglement.

The dimension of temporality further enriches this understanding. Organizations are not just organisms in the present; they carry with them, their lived histories, and the life histories of their members. This temporal depth influences the present moment, shaping its materialization and unfolding. The discourse of shared value, once relegated to traditional corporate settings, has the potential to redefine the informal sector's narratives. This reimagining dismantles existing biases and reflects a call for ethical consideration in all pursuits of knowledge.

This journey concludes with an imperative reflection on mattering. The selective significance attributed to certain phenomena and not others is a matter of ethical consideration. In the words of (Barad, 2007):

*“It is not only how discourse comes to matter but how matter comes to matter... We are not merely differently situated in the world; “each of us” is part of the intra-active ongoing articulation of the world in its differential mattering” (210; 381)*

Upon reflection of these intra-active ideals, researcher positionality shifts from static knowledge producer to engaged knowledge creator, in which shared value has shifted from study objective to study purpose.

In essence, this thesis amplifies the notion that knowledge, particularly when applied to phenomena like shared value creation, necessitates an understanding of entanglements. Inquiry emerges from lived experiences, knotted together with personal narratives, and is woven with ethical, ontological, and epistemological necessities. This realization beckons a reassessment of the mattering we impose on different phenomena and a call for us, as knowledge-seekers to recognize the intrinsic value of all narratives. Collectively, the chapters have aimed to enrich understanding of organising phenomena, by revealing its intricacies and potential to drive positive change across diverse contexts. The exploration of the phenomena of shared value creation within various paradigms has been envisioned to culminate a deeper appreciation of its multifaceted nature and transformative power in reshaping notions of value, organization, and societal progress.

The contribution of this thesis is fourfold. Firstly, contributions to knowledge in advancing the understanding of shared value creation. Secondly, contributions to theory through the development of process-praxeology. Thirdly, in the value of adopting bricolaged methodologies that employ diffractive techniques, and lastly, how these contributions support a practice of critical organisational scholarship (Goldman, 2017; Llewelyn, 2003). These contributions are discussed in more detail below:

## 6.1 PERTINENT FINDINGS

The pertinent findings of each chapter reveal that reimagining SVC in an ontology of process has enabled it to more fruitfully meet its intent by realigning theory with practice. The findings reveal how localisation becomes an enabler of shared value creation when it is supported by embeddedness and rich contextual knowledge. Narratives play an influential role in how businesses respond to and enacts with its environment, which temporally affect how they engage in future enactments. The narrative of shared value creation is personal, reinforced by both organisational and personal behaviour and values. When shared value creation is entwined with the purpose of the business, the findings reveal that it becomes articulated as a narrative of mutual value creation, which materialises in practice. Shared value creation becomes mobilized by values of reciprocity and scaled when it becomes the living and shared philosophy and narrative of all actors involved which includes entrepreneurs, community stakeholders, leaders and project implementors. Collectively, the intent of shared value creation should be that of transformative change, with the social context becoming a stakeholder embedded with agency in processes of creating shared value.

The findings reveal how shared value creation is incomprehensible within the limitations of dualisms, which can therefore help overcome the tensions that have emerged from dualisms in the existing literature. Creating Shared Value is a multi-dimensional phenomenon inclusive of business, society, nature, and self, not limited to tangible exchanges of value but includes intangible forms of value exchange such as knowledge and values. One of the pertinent findings reveal how learning should become a priority of creating shared value for all stakeholders involved. As a multidimensional phenomenon, shared value creation requires iterative processes and innovation for its realization.

## 6.2 OVERALL CONCLUSIONS

This study has presented an opportunity to raise new questions that address power dynamics, practitioner value, and ethics, as well as explore new contexts, which as collectively culminated in the ethico-onto-epistemology of process-praxeology. Within this reimagination researchers and their instruments are implicated with a renewed sense of responsibility in how our ontologies determine what comes to matter. The study has illuminated the importance of individuals and their lived experience and

how this co-creates the materialization of a collective phenomenon. As an overall conclusion, the study has revealed how organisations are personified as living organisms, as they are a collective of personal lived experiences and cannot be abstracted from the individuals and their experiences that constitute this collective.

### 6.3 PRACTICAL RECOMMENDATIONS

Some of the practical recommendations of the study reveal include the potential value of partnerships to enable shared value creation, particularly when a partner has strong linkages with the community. In practice, partners need to strategically align their purpose and intent for creating shared value. Initiatives need to be co-created with partners consciously mediating their dynamics of power and inclusion of multiple stakeholder inputs. When considering the implementation of shared value creation in practice, it needs to be understood as an iterative process that requires a consciousness that is responsive to context. All stakeholders should see shared value creation as a learning journey and be open to the exchange of knowledge and experiences. In addition, the study revealed how personal values play an important role in scaling shared value creation in practice, therefore employing implementers based on their values could be an important factor to consider when conceptualising shared value initiatives. Lastly, in terms of practice, the study revealed how shared value creation is enabled by continuous reflective practice, which should ideally become institutionalized, noting the importance of promoting empowering narratives and capabilities for conscious enactment.

### 6.4 RESEARCH AND METHODOLOGICAL RECOMMENDATIONS

For researchers, this thesis presents valuable insights into researcher positionality. As researchers we should take ownership of our agency and power in our processes and practices of knowledge creation. This implicates ethics in these processes and practices, meaning that any pursuit of inquiry should be ethically derived. It is essential that we become aware of how our ontologies, epistemologies, and methodologies determine what comes to matter and what our knowledge making processes and practices situate as differential to mattering. We must be conscious of what we are including and excluding. Reimagining organizational studies as process-praxeology means focusing on creating new and ethically driven knowledge pursuits, allowing new actions to be revealed that are sensitised to practical value. As a collective body of work, this thesis invites scholars, practitioners, and policymakers to engage in a holistic and dynamic approach to value creation, one that transcends traditional boundaries and paves the way for a more inclusive and sustainable future.

In terms of methodology, the value of diffraction and diffractive analysis has been demonstrated in this thesis which lies in the understanding of what differences our knowing-making practices have on the

world, reading insights and approaches through one another to illuminate differences as they emerge. By investing in the lived experiences of diffracted voices and diffracted contexts, a transcendence is enabled beyond the discursive histories that have been mainstreamed in what comes to matter.

## 6.5 LIMITATIONS OF THE STUDY AND AVENUES FOR FUTURE RESEARCH

Even though an in-depth, qualitative study has high accuracy based on its closeness to data, it is unable to explain outcomes easily explained by relationships of causality. Additionally, the study involved small samples in concentrated geographical areas. Therefore, future research could explore how informal businesses could be leveraged to advance shared value creation and investigate contexts in other geographical areas. A longitudinal study of shared value creation could help understand its evolutionary process. Future research could explore whether formalization impacts localization and consequently the performativity of shared value creation in the informal sector. Since shared value creation is enabled through practices of conscious enactment and learning, future research may want to consider how this enactment translates to capabilities such as dynamic capabilities, by asking how an unbound organization would adapt, integrate, and reconfigure its resources in response to a dynamic and agentic environment. Lastly, future research could explore the process of reimagining other organisational phenomena through the process-praxeology lens.

As this thesis draws to a close, I would like to invite you to reflect on these four takeaways:

- 1) Creating Shared Value is a lived, living philosophy, dynamic and continuous, that exists beyond conventional corporate boundaries and settings.
- 2) The environment within which we operate has agency, we act upon it, and it acts upon us.
- 3) Our agency is invested with ethics in our knowledge-seeking endeavours. What are we enabling to matter and not?
- 4) Ultimately, how we create research that is impactful, is to be reflective of this ethical responsibility, agency, and entanglement. In seeking knowledge, we embody values of mutual benefit to create added value for all our stakeholders.

In closing, for me, the essential lesson is that knowledge is not a solitary endeavour but an entwined exploration that shapes an understanding of the world. It is a call to embrace the complexity of perspectives, narratives, and influences that collectively contribute to the fabric of organisations and organisational phenomena, such as shared value creation. This journey extends beyond academic exploration; it is a pursuit of ethical awareness and an invitation to acknowledge and respect the agency of all actants in the intricate dance of unfolding knowledge. Within this context of responsible knowledge arises an implication of responsible practice, particularly in the manner addressed in Gherardi and Laasch (2022) and Laasch's (2018) responsible management. I conclude with this call to action for all organisational scholars to critically diffract on the boundaries, knowledge and practice their contributions consequently solidify or dissolve.

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